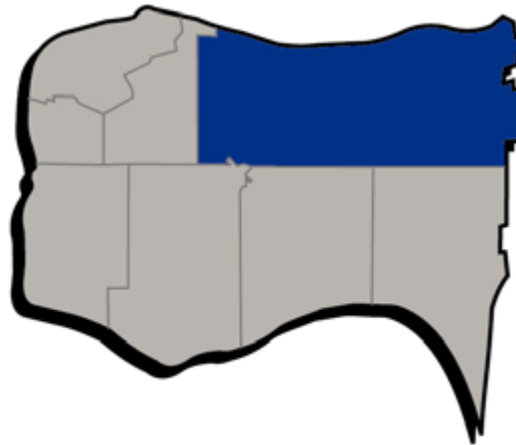




Planning Services Business Plan

Town of Lakeshore
October 26, 2009



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EXECUTIVE SUMMARY

Planning Services Business Plan Committee is pleased to submit the Business Plan.

This review:

- Identifies external challenges affecting Planning Services;
- Identifies and evaluates performance measures;
- Identifies staffing needs and other resource requirements;
- Reviews user fees to recover additional corporate costs;
- Identifies and evaluates other service delivery models, and;
- Identifies a preferred service delivery model.

The Town of Lakeshore is accountable for protecting provincial policy interest as set out in the 2005 Provincial Policy Statement (PPS) and for ensuring conformity with their Official Plans. Therefore, the Town of Lakeshore must ensure that it has the technical expertise and support to carry out its plan review and approval responsibilities and is expected to have the ability to provide for the delivery of the following municipal services as mandated under the *Ontario Planning Act* and subsection 15.1(3) 15.6(1) of the *Ontario Building Code Act* (Property Standard Appeals):

- Committee of Adjustment – Minor variances, consents, enlargements, extensions or changes to legal non-conforming uses; consent to mortgages, partial discharge of mortgages, validation of title, access right-of-ways, easement and leases over 21 years and property standard appeals;
- Land Use Planning – Official Plan Amendments, Zoning By-law Amendments, Plans of Subdivisions, Plans of Condominium, Part Lot Control and Site Plan Approvals, and;
- Long Range Planning – Policy Research and Long Range Planning, Official Plan and Zoning By-law updates, Secondary Plan preparation, Special Studies, Population and Demographic Studies, Master Plans, Design Guidelines and Community Improvement, Subdivision summaries, Exhibit preparation and Mapping.

In addition, the Town of Lakeshore is expected to have the ability to:

- Identify the need for any necessary studies associated with a plan review;
- Set and clear conditions for approval; and

- Obtain technical expertise to review technical studies, as necessary.

Planning Services key responsibilities include the following:

- Development of planning policies/strategies to guide the future growth;
- Overseeing the coordination and evaluation of development proposals;
- Preparation and review of the Official Plan and Zoning By-law;
- Providing advice and counsel on planning matters;
- Planning review/evaluation of applications made to the Committee of Adjustment;
- Related community consultation;
- Interdepartmental / government / agency liaison;
- Staff supervision and development;
- Policy and standards recommendation;
- Departmental business planning and capital / operating budgets;
- Coordination of Planning studies, and;
- Council / Committee / Public Hearing report preparation.

This present analysis takes into account the recent decline in economic and population growth, but at the same time takes into account the recent forecasts by Lapoint Consulting (2008), EDP Consulting (2008), the Ministry of Finance (2008/2009) and C.N. Watson and Associates (2006) that suggest the present state of the economy may be short term and that over time the economy will improve (Source: Building Services Business Plan, 2008). N. Barry Lyons Consultants (2009) Limited notes that the Provincial Economy will begin to recover by 2011-2012, with the Windsor-Essex Economy lagging slightly, likely not returning to pre-2004 levels until after 2016.

This Business Plan concludes the following:

- The Town of Lakeshore is the busiest municipality in Essex County and its workload during low periods and high periods is similar to that of larger municipalities in Ontario with populations over 30,000;
- The existing internal staff complement of 3 (FTE's) and external staff complement of 1.25 (FTE's) (external staff complement based on lower development activity) is below average for a municipality of this size and volume of work;
- Currently, application processing times allow us to conclude that the Town of Lakeshore's internal efficiency is at an acceptable level and compares positively with the comparators;

- Statistically, the planning application review process performs well, however a number of operational changes to the planning process can be made across the entire process to develop a better understanding by all stakeholders, increase transparency, and ultimately resident satisfaction with the process, and;
- It appears that the design and implementation of timely and efficient upper-tier approval processes for the County will be of paramount importance to approvals by Council that also require approval by the County of Essex.

This Business Plan covered all aspects of Planning’s service delivery functions and makes 19 recommendations under 6 main areas:

1. Committee of Adjustment, Land Use Planning, Long Range Planning;
2. External Challenges;
3. Performance Measures;
4. Budget;
5. User Fees, and;
6. Service Delivery Model.

Committee of Adjustment, Land Use Planning, Long Range Planning Services

- ✓ **Recommendation:** Maintain the current service delivery structure with documented performance measures and ongoing communication of performance measure results.

External Challenges

- ✓ **Recommendation:** Planning Services must meet the challenge of establishing a stable revenue base for planning and development functions and shall move towards additional cost recovery of Planning Services functions through the introduction of a new fee schedule for services rendered;
- ✓ **Recommendation:** Planning Services shall review its public participation programs and initiatives to ensure adequate involvement of Lakeshore citizens in community planning matters;
- ✓ **Recommendation:** Planning Services shall review its current staffing capabilities and capacities with respect to annual volume of development applications and diversity of work, and;
- ✓ **Recommendation:** Planning Services shall ensure easier access to staff reports, by-laws and support documents on the Town’s website.

Performance Measures

- ✓ **Recommendation:** Planning Services shall ensure the development of a performance measure for participant and resident satisfaction with the community planning process and ongoing communication of performance measure results;
- ✓ **Recommendation:** Planning Services shall ensure the documentation of performance measures outlined in Appendix 'C' and the ongoing communication of performance measure results;
- ✓ **Recommendation:** Statistically, the planning application review process performs well, however a number of operational changes to the planning process can be made across the entire process to develop a better understanding by all stakeholders, increase transparency, and ultimately resident satisfaction with the process (See Appendix 'D'), and;
- ✓ **Recommendation:** Planning Services shall ensure ongoing communication with the County of Essex to achieve timely upper-tier approvals for local official plans, local official plan amendments, plans of subdivision / condominium and part lot control.

Budget

- ✓ **Recommendation:** Planning Services shall continue to ensure that the only costs that are charged to the consulting Planner's account shall be costs that cannot be recoverable from the applicant, such as the consultant's attendance at TAR (Technical Advisory Review Committee) and general consulting costs not related to a submitted application;
- ✓ **Recommendation:** Secondary Plans and supporting studies shall be completed by the developer / applicant if at all possible to avoid the Town absorbing the cost for these studies, and;
- ✓ **Recommendation:** Planning Services Business Plan Committee is recommending that the Municipality move towards additional cost recovery of Planning Services functions.

User Fees

- ✓ **Recommendation:** That all external costs associated with a plan review are charged back 100% to the applicant;

- ✓ **Recommendation:** That Planning Services meet the challenge of establishing a stable revenue and operating base for planning and development functions and recommend that fee increases (See Appendix 'F') for all services provided by the Municipality be implemented and phased in over a two year period, including application review and additional fees for pre-consultation, legal review, engineering review, septic review, agreement preparation, advertising, additional open houses or public meetings and Ontario Municipal Board (OMB) costs etc., and;
- ✓ **Recommendation:** That fees are automatically (annually) indexed to inflation.

Service Delivery Model

- ✓ **Recommendation:** That the Town maintain their overall approach and service structure given the current economic climate. By retaining the current service delivery model (on an “as needed basis”) management is better able to closely align its work priorities and activities of staff with the circumstances of the local economy. The current service delivery model provides the flexibility for a more efficient review of development applications during both low periods and high periods of work, while at the same time minimizing costs to the Municipality during times of budgetary constraint. However, performance measures should be communicated to staff, council and the community and be the basis for service expectations. Poor performance measures/indicators may indicate the need to consider hiring additional internal staff or may be the trigger to review the efficiency of the current service delivery model and the need to transition to a different model of providing planning services. At the end of each year, performance measure tools will be used to obtain feedback on the impact of and efficiency of the current service delivery model;
- ✓ **Recommendation:** That the existing internal staff complement of 3 Full Time Employees (FTE’s) and external staff complement of 1.25 FTE’s be maintained in order for the municipality to provide for the most effective cost delivery of municipal services as mandated under the *Planning Act* and *Building Code Act*. As indicated by the survey on comparative staffing any inappropriate downsizing of staff would lead to negative consequences for the Town’s ability to carry out its plan review functions in an efficient manner;
- ✓ **Recommendation:** An analysis of present workforce competencies and an identification of competencies needed in the future was undertaken for the Planning Coordinator position. If this position becomes vacant at any point in time in the future this position shall be dissolved and replace by a qualified professional planner (junior planner) with full or provisional membership in the Ontario Professional Planners Institute.

- ✓ **Recommendation:** That the benchmark service level of 170 applications be the 'trigger' to review additional internal staffing requirements (this figure is based on the average volume of development applications observed from 1999-2008 and an analysis of current workloads in the Department). This benchmark reflects a specific application level that could be considered a "high level" year of planning activity. As indicated by the survey on comparative staffing during both high and low periods of development activity in the Town of Lakeshore, any inappropriate downsizing of staff and resources would lead to negative consequences for the Town's ability to carry out its plan review functions in an efficient manner.

SECTION A: SUBJECT (Division Overview)

This document represents the Business Plan for the Planning Services Division of the Community and Development Services Department of the Town of Lakeshore whose mandate is to provide professional planning advice through development review and policy planning. Planning Services strives to ensure that the Town’s vision to create “*a progressive Town of healthy integrated communities*” is achieved through good planning practices and responsible management of resources. Planning Services supports the public interest through the implementation of the Town’s official plan (s) and zoning by-law (s).

Purpose

The purpose of this Business Plan is to analyze the efficiency and effectiveness of Planning Services business practices in the Town of Lakeshore. This Business Plan provides Planning Services with an opportunity to document what services we deliver and to identify those opportunities and challenges which are strategic issues that affect the way we operate. In response to these strategic issues, strategies can be developed so that Planning Services can work toward realizing their long term goals, while indicating to taxpayers, Administration and Council where Planning Services is headed in the future. The purpose is to align the business activities of Planning Services to the vision for the Town and to measure progress.

The operation of Planning Services is based on the Town’s vision which reflects our commitment to:

- ✓ Meeting legislated and legal obligations;
- ✓ Providing timely professional services to customers, and;
- ✓ Providing services that contribute to a high quality of life for the citizens of the Town of Lakeshore.

Planning Services operates within the Community and Development Services Department of the Town of Lakeshore and provides professional planning advice to Council, the public and Council endorsed committees on a wide variety of development and policy related issues. Our work is guided by principles set by Council and the Community and Development Services Department. Planning Services adheres to federal and provincial regulations, municipal by-laws, and planning policies, as follows:

Ontario Planning Act
Ontario Municipal Act
Ontario Environmental Protection Act
Ontario Environmental Assessment Act
Town of Lakeshore Official Plan
Ontario Building Code
Other Federal and Provincial Regulations

Provincial Policy Statement
County of Essex Official Plan
Municipal Official Plans
Municipal Zoning By-laws
Ontario Heritage Act
Ontario Fire Code
Municipal By-laws

Planning Services exists to provide cost effective, high quality planning services. Our goal is to provide the necessary management framework and tools to ensure that the Town of Lakeshore is a healthy and desirable place to live, work and enjoy recreational activities. Planning Services embraces the opportunity to build a model community for the future which ensures orderly and efficient development patterns by building sustainable and complete communities while protecting and enhancing the Town's rich natural and agricultural resources.

Historical Organizational Structure

Table 1 illustrates Planning Services organizational structure and staffing levels from 1999 to present. Since the Town of Lakeshore's amalgamation in 1999 and until 2000, Planning Services had a total of 2 FTE's and operated under the general direction of an outside planning consultant. 1.25 FTE's are estimated to be allocated from the outside planning consultant. The outside planning consultant reported directly to the Clerk's Department. From 2001 to 2004, Planning Services had a total of 2 FTE's and continued to operate under the general direction of the outside planning consultant. 1.25 FTE's are estimated to be allocated from the outside planning consultant. The outside planning consultant reported directly to the CAO's Office. In 2005, several changes to the organizational structure of the Town of Lakeshore led to the current organization of Planning Services under the Community and Development Services Department.

Table 1 – Planning Services Organizational Structure & Staffing Levels (1999-2009)

Staff	Clerks		CAO				Community & Development Services				
	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009
*Manager of Development Services (Planner)							*1	*1	*1	*1	*1
Planning Coordinator	1	1	1	1	1	1	1	1	1	1	1
Administrative Assistant	1	1	1	1	1	1	1	1	1	1	1
**Temporary Worker									**1		
Outside Planning Consultant	1.25	1.25	1.25	1.25	1.25	1.25	*1.25	*1.25	*1.25	*1.25	*1.25
Total Internal Employees	2	2	2	2	2	2	3	3	3	3	3
Total	3.25	3.25	3.25	3.25	3.25	3.25	4.25	4.25	4.25	4.25	4.25

Notes:

* Denotes Registered Professional Planner (MCIP, RPP)

* *Temporary Worker - Administrative Assistant (2007, 4 months)

Total Internal (Excludes Temporary Workers and Outside Planning Consultant)

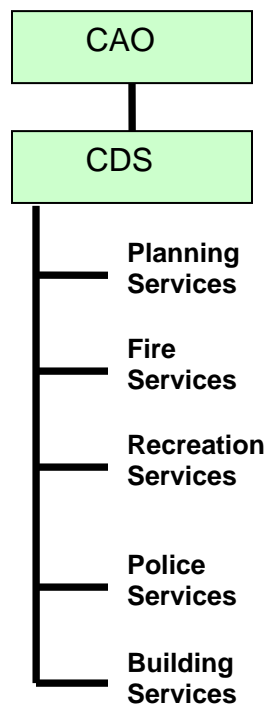
1.25 FTE's estimate for outside planning consultant 1999 to 2004 (small firm)

1.25 FTE's estimate for outside planning consultant 2005 to 2009 (larger firm, but lower development activity period)

Organizational Structure

Planning Services operates from the Town of Lakeshore Municipal Offices in Belle River. Planning Services has been a Division of the Community and Development Services Department since 2005 (See Figure 1). The Manager of Development Services oversees the Division's operations and is also the Town's acting registered professional planner (MCIP, RPP). The Manager of Development Services reports to the Director of Community and Development Services. There are currently 3.00 full-time employees (FTE's) within the organization. Planning Services also engages an outside planning consultant to process a portion of the development applications. 1.25 FTE's are estimated to be allocated from the outside planning consultant during periods of low development activity (See Figure 2).

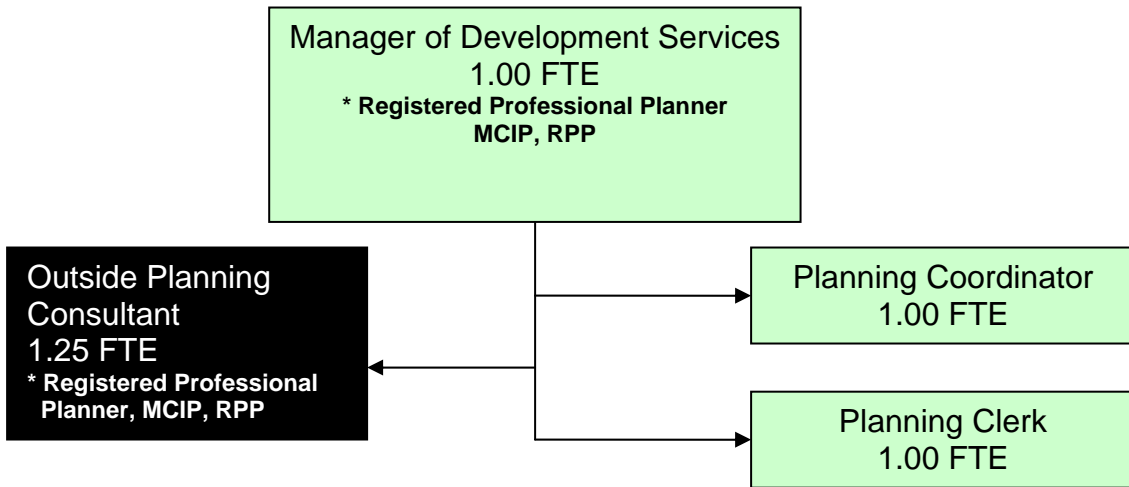
Figure 1 – Town of Lakeshore Organizational Structure



* CAO – Chief Administrative Officer

* CDS- Community and Development Services

Figure 2 - Planning Services Organizational Structure



*FTE: Full Time Equivalent

Core Business

Customers & Stakeholders

Planning serves many public and private customers, both within and outside the Town of Lakeshore:

External Customers

- ✓ General public
- ✓ Taxpayers (property owners and businesses)
- ✓ The development and building industry
- ✓ Community groups

Internal Customers

- ✓ Council / Committee of Adjustment
- ✓ Town department
- ✓ CAO
- ✓ TAR Committee

Stakeholders

- ✓ Federal government
- ✓ Provincial government
- ✓ School boards
- ✓ Essex County
- ✓ Conservation Authorities
- ✓ Other Agencies

Planning Services works in partnership with Town Departments and stakeholders to achieve the Town's planning goals.

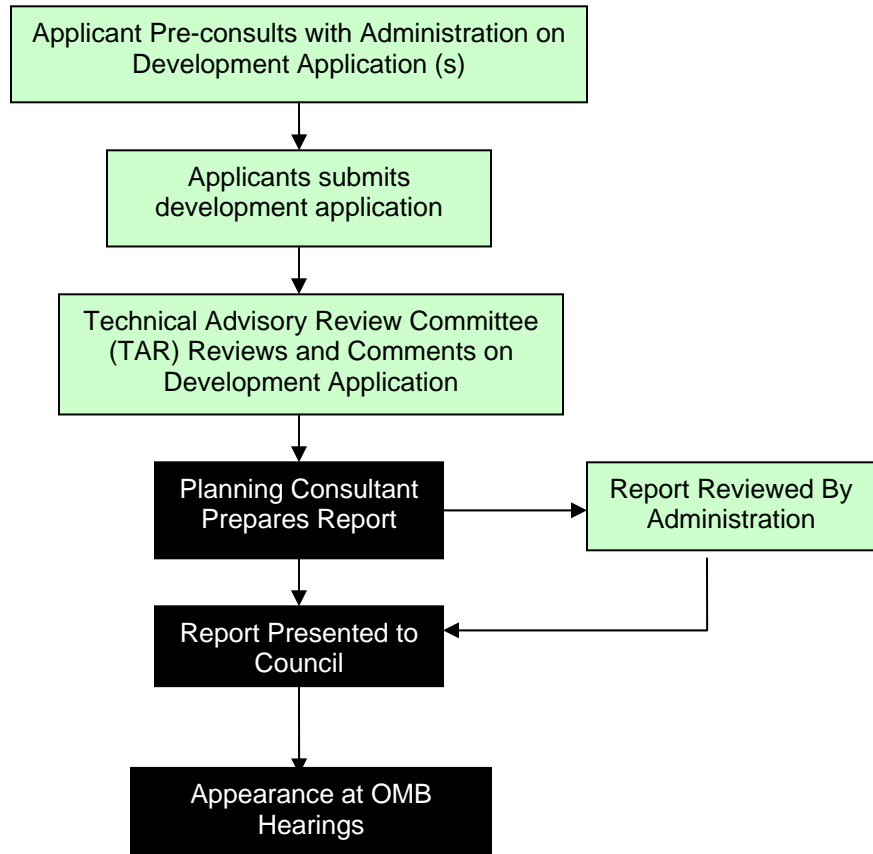
Service Delivery

The Town of Lakeshore is accountable for protecting provincial policy interest as set out in the 2005 Provincial Policy Statement (PPS) and for ensuring conformity with their Official Plans. The Town of Lakeshore must ensure that it has the technical expertise and support to carry out its plan review and approval responsibilities. In addition the Town of Lakeshore is expected to have the ability to provide for the delivery of the following municipal services as mandated under the *Planning Act* and subsection 15.1(3) 15.6(1) of the *Building Code Act* (Property Standard Appeals):

- Committee of Adjustment – Minor variances, consents, enlargements, extensions or changes to legal non-conforming uses; consent to mortgages, partial discharge of mortgages, validation of title, access right-of-ways, easement and leases over 21 years and property standard appeals. The Manager of Development Services, Planning Coordinator (Secretary-Treasurer to the Committee of Adjustment) and Planning Clerk process Committee of Adjustment Applications in accordance with the *Planning Act*. The minor variance and consent application processes can be found in Appendix 'A'.
- Land Use Planning – Official Plan Amendments, Zoning By-law Amendments, Plans of Subdivisions, Plans of Condominium, Part Lot Control and Site Plan Approvals. Land use planning services are provided in the Town of Lakeshore in partnership with the County of Essex. Applications for development are required to be submitted to the Town of Lakeshore and / or the County of Essex. The County of Essex is the upper tier planning approval authority for local official plans, local official plan amendments, plans of subdivision and condominium and part lot control. The municipal processes for land use planning applications can be found in Appendix 'B'. Currently, an outside planning consultant provides for a portion of development application processing for the Town of Lakeshore in conjunction with Administration. Figure 3 illustrates the typical planning

relationship between the Town of Lakeshore and the outside planning consultant.

Figure 3 – Outside Planning Consultant (Service Delivery Model)



- Long Range Planning – Policy Research and Long Range Planning, Official Plan and Zoning By-law updates, Secondary Plan preparation, Special Studies, Population and Demographic Studies, Master Plans, Design Guidelines and Community Improvement, Subdivision summaries, Exhibit preparation and Mapping.

Some of the recent projects and plans that are included in the Division’s overall mandate include:

- ✓ Town of Lakeshore Official Plan (Upper Tier Approval);
- ✓ Comprehensive Zoning By-law;
- ✓ County Road 22 Corridor Study (Secondary Plan & Design Guidelines);

- ✓ Renewable Energy Policies;
- ✓ Advance Boulevard & Croft Drive Secondary Plan;
- ✓ Community Improvement Plan (CIP);
- ✓ Planning Services Business Plan;
- ✓ CityView Database Management System (Planning Services);
- ✓ County of Essex Official Plan Review;
- ✓ Planning Web Site Review;
- ✓ Subdivision Mapping and Summary Statistics, and;
- ✓ Wind Turbine Mapping.

Projects are currently undertaken by Administration and / or externally by outside consultants. The demand for these projects is largely market driven or legislatively required. Since the planning system in Ontario is policy driven, it is a requirement for official plans to be updated every five years and for zoning by-laws to be updated to conform to a new official plan within three years.

Other Program & Support Activities

In addition to the municipal services conducted under the three primary business lines (Committee of Adjustment, Land Use Planning, Long Range Planning) the Division also conducts activities in the following areas:

- Preparation of development agreements, including site plan agreements and subdivision agreements;
- Telecommunication facility review;
- Preparation of compliance letters (zoning requests);
- Registration of by-laws (road naming or changing by-laws) and development agreements;
- Urban design review;
- Transportation planning;
- Heritage planning;
- Environmental planning;
- Registration / researching of legal documents, and;
- Customer services guidance to residents, businesses and applicants.

In addition, the Town of Lakeshore is expected to have the ability to:

- Identify the need for any necessary studies associated with a plan review;
- Set and clear conditions for approval; and
- Obtain technical expertise to review technical studies, as necessary.

Planning Services key responsibilities include the following:

- Development of planning policies/strategies to guide the future growth;
- Overseeing the coordination and evaluation of development proposals;
- Preparation and review of the Zoning By-law;
- Providing advice and counsel on planning matters;
- Planning review/evaluation of applications made to the Committee of Adjustment;
- Related community consultation;
- Interdepartmental / government / agency liaison;
- Staff supervision and development;
- Policy and standards recommendation;
- Departmental business planning and capital / operating budgets;
- Coordination of Planning studies, and;
- Council / Committee / Public Hearing report preparation.

Highlights – 2008/2009

Highlighted below are some of the Division's achievements for 2008/2009, along with some key initiatives underway:

- ✓ The new Town of Lakeshore Official Plan was adopted by Council on May 26, 2008 and is currently awaiting approval from the County of Essex;
- ✓ On December 9, 2008 Council adopted a Policy for the development and / or redevelopment of telecommunication tower antenna facilities;
- ✓ In 2008 staff commenced and has since completed a draft of the Secondary Plan for the Advanced Boulevard and Croft Drive Area;
- ✓ In 2008 staff designated the newly expanded Belle River Business Improvement Area (BIA) as a Community Improvement Project Area and commenced a Community Improvement Plan (CIP);
- ✓ In 2008 staff developed a site screening questionnaire for environmental screening;
- ✓ In the Spring of 2009 staff commenced participation in the County of Essex Official Plan review;
- ✓ Staff are currently conducting a review of the planning section's web site to make it more user friendly for customers;

- ✓ In January 2009 Planning Services commenced the Zoning By-law Consolidation Project and the County Road 22 Corridor Study, and;
- ✓ In the Spring of 2009 Planning Services commenced work on the CitiView data management system.

SECTION B: ANALYSIS

Purpose

The purpose of this Business Plan is to analyze the efficiency and effectiveness of Planning Services business practices in the Town of Lakeshore. This Business Plan identifies the following goals:

1. To identify external challenges that affect current Planning Services business practices;
2. To identify and evaluate performance measures;
3. To identify staffing needs and other resource requirements;
4. To review user fees to recover additional corporate costs;
5. To identify and evaluate other models of providing service, and;
6. To identify a preferred business model that provides an acceptable level of service to Administration, Council and taxpayers.

Method of Analysis

Lakeshore Today – Key Challenges

The Town of Lakeshore is the largest municipality in the County of Essex with over 530 square kilometers (Source: Windsor-Essex County Development Commission). The Town of Lakeshore's population has increased rapidly over the years with a projected average annual growth rate of 2.4 % over the past 10 years (1996-2006), significantly higher than both the national and provincial averages (Source: Windsor-Essex County Development Commission) (See Figure 4 and Table 2).

Figure 4- Population Growth (1996-2006)

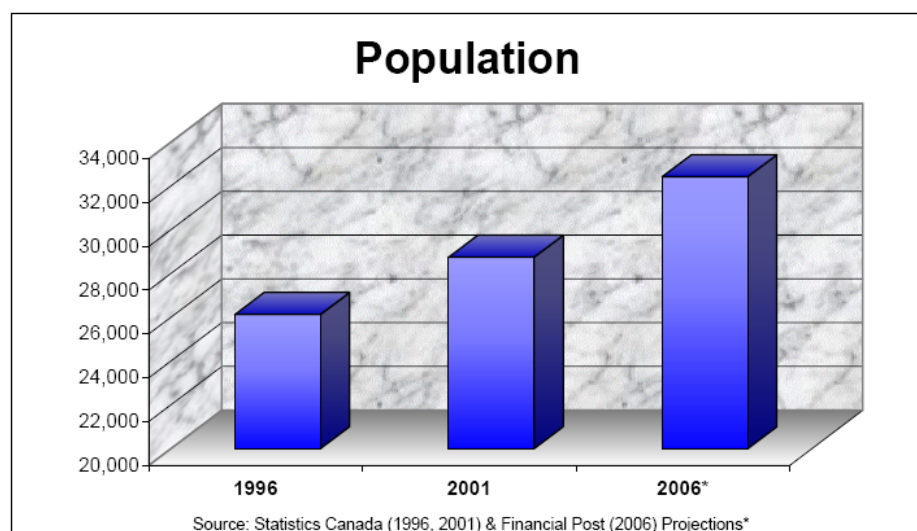


Table 2 – County Population Growth

Essex County and Local Municipalities, Population 1986 - 2006							
	1986	1991	1996	2001	2006	2001-06	1986-06
Municipality of Leamington	21,760	22,696	25,389	27,138	28,833	6.2%	32.5%
Town of Amherstburg	16,447	17,578	19,273	20,339	21,748	6.9%	32.2%
Town of Essex	16,976	18,386	19,437	20,085	20,032	-0.3%	18.0%
Town of Kingsville	16,649	17,330	18,409	19,619	20,908	6.6%	25.6%
Town of Lakeshore	21,450	23,720	26,127	28,746	33,245	15.7%	55.0%
Town of LaSalle	14,001	16,628	20,566	25,285	27,652	9.4%	97.5%
Town of Tecumseh	15,684	19,320	23,151	25,105	24,224	-3.5%	54.5%
Township of Pelee	284	272	283	256	287	12.1%	1.1%
Essex County	123,251	135,930	152,635	166,573	176,929	6.2%	43.6%
City of Windsor	193,122	191,435	197,694	208,402	216,473	3.9%	12.1%
<i>Windsor-Essex Region</i>	<i>316,373</i>	<i>327,365</i>	<i>350,329</i>	<i>374,975</i>	<i>393,402</i>	<i>4.9%</i>	<i>24.3%</i>
Province of Ontario	9,101,694	10,084,885	10,753,573	11,410,046	12,160,282	6.6%	33.6%

Source: N. Barry Lyons Consultants Limited

Planning Services is currently facing a number of challenges:

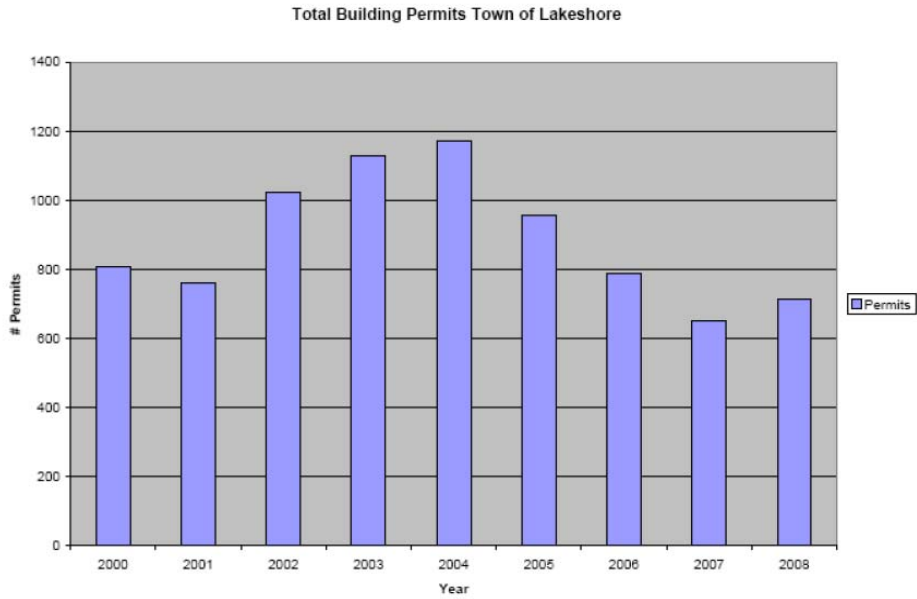
External Challenges

- The recent decline in the regional economy (since 2004) comes at a cost as the Town of Lakeshore’s financial situation becomes more constrained and public confidence in the community and businesses declines;
- The Windsor CMA currently has the highest unemployment rate in Canada at roughly 14.5 %. Causes include:
 - U.S. economic recession;
 - Global economic downturn;
 - Global credit crisis;
 - High Canadian dollar;
 - High price of oil;
 - Increased outsourcing of manufacturing jobs;
 - Restrictions and delays at border crossings;
 - Labour conflicts and disruptions; and
 - Changing consumer habits.

Source: N. Barry Lyons Consultants Limited

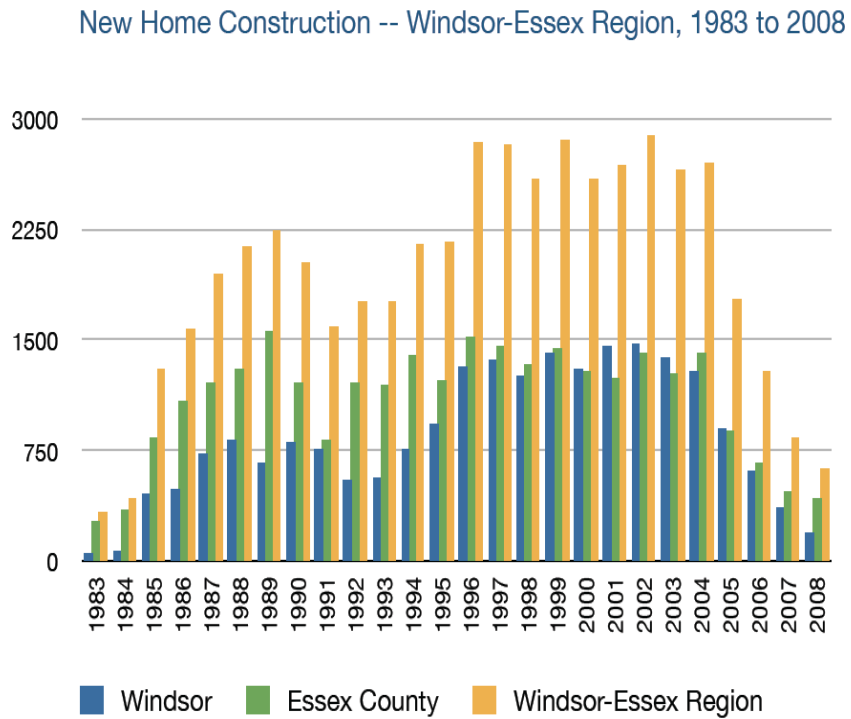
- Resale and new home markets have declined. Low housing starts will require lower levels of residential land, servicing, less demand for development applications, building permits and inspection and property assessment (See Figure 5 & Figure 6);

Figure 5 – Town of Lakeshore Building Activity (2000 – 2008)



Source: Town of Lakeshore Building Services

Figure 6 – New Home Construction – Windsor Essex Region 1983 to 2008



Source: 2008 IMPC Annual Report

- Low business activity also means lower office and commercial space absorption and assessment;
- Planning Services must meet the challenge of establishing a stable revenue and operating base for planning and development functions;
- As the Town of Lakeshore continues to grow and mature over the 20 year planning horizon (2008-2028), demand for new or expanded services, such as local economic initiatives, community plans, affordable housing / seniors housing, urban / landscape design, heritage planning, crime prevention initiatives (CPTED), transportation planning, healthy community initiatives, environmental planning (including LEED principles in building design) and alternative energy initiatives may be considered necessary services. The need for these services may affect the Division's staffing capabilities and capacities, and;
- Citizens and the business community are increasingly demanding electronic service delivery (posting of documents, plans, regulations, application forms, reports, by-laws, policies, public notices etc. on the Town's website) to provide faster and convenient service to customers. Although Planning Services is now utilizing the Town's web site to post certain studies, notices, etc., easier access to staff reports, by-laws and support documents on the Town's web site is being demanded by customers.

Planning Services will be obliged to closely examine how they deliver their services in the future.

This present analysis takes into account the recent decline in economic and population growth, but at the same time takes into account the recent forecasts by Lapoint Consulting (2008), EDP Consulting (2008), the Ministry of Finance (2008/2009) and C.N. Watson and Associates (2006) that suggest the present state of the economy may be short term and that over time the economy will improve (Source: Building Services Business Plan, 2008).

N. Barry Lyons Consultants (2009) Limited notes that the Provincial Economy will begin to recover by 2011-2012, with the Windsor-Essex Economy lagging slightly, likely not returning to pre-2004 levels until after 2016.

Performance Measures

Planning Services business operations are largely market driven. Therefore performance indicators focus on business volumes, and where applicable are measured by “number of days” to process a development application. Another performance measure is participant and resident satisfaction with the community planning process. At present Planning Services is not actively measuring this performance indicator. Table 3 shows the volume of development applications in the Town of Lakeshore from 1999 to 2008.

From 1999 to 2005 the number of multi-consent applications submitted to the Town were high, due to the division of land proceeding through the consent process rather than through the plan of subdivision process. The statistics showing the number of development applications submitted to the Town of Lakeshore between 1999 to 2008 show a fluctuating pattern for all application types which is reflective of economic and building activity in the decade.

Table 3 - Volume of Development Applications (1999 to 2008)

Application	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008
Multi-Consents	37	44	83	509	405	1037	176	0	0	0
Consent	108	112	71	107	84	94	83	45	62	49
Minor Variance	50	68	65	73	59	67	51	37	31	40
Site Plan	24	25	12	21	12	18	24	13	9	14
OPA	5	3	1	3	1	1	0	4	8	1
ZBA	18	21	16	13	8	11	9	12	33	23
H-Removal	5	8	5	17	9	7	5	1	4	2
Wind Farm	0	0	0	0	0	0	0	0	3	4
Sub / Condo	1	1	3	2	0	1	1	3	2	0
Part Lot	1	0	0	5	1	0	0	2	0	0
Total	249	282	256	750	579	1236	349	117	152	133
Total (Excluding Multi-Consents)	212	238	173	241	174	199	173	117	152	133

Recently, there has been a downturn in the economy in the last few years, with an accompanying slowdown in building permit activity, which is reflective in the number of development applications submitted to the Town between 2006 to 2008 (lower growth period). The number of development applications submitted in 2006 is lower than previous years as applicants tried to submit development applications prior to the implementation of the *Provincial Policy Statement (PPS)* in 2005.

Table 4 shows the legislative (*Planning Act*) requirement, Town of Lakeshore actual and comparators (other municipalities) time (days) required for completion of committee of adjustment and other land use planning applications. Completion time is defined as the period of time elapsed between the date of submission of a complete application and approval date by Council.

Table 4 – Planning Services Performance Measures

Application Type	Decision on Application Type (<i>Planning Act</i>)	Appeal Period (<i>Planning Act</i>)	Planning Services (Actual)	Comparators (Average)	Planning Services (Target)
Consent	90 days	20 days	50 days	46 days	45 days
Minor Variance	30 days	20 days	50 days	45 days	45 days
Zoning Amendment	120 days	20 days	95 days	97 days	90 days
Plan of Subdivision / Condominium	180 days	20 days	180 days	122 days	120 days
Official Plan Amendment	180 days	20 days	90 to 120 days	105 days	110 days
Site Plan Control	30 days	30 days	30 to 90 days	65 days	40 days
Part Lot Control			30 days		30 days
H-Removal			60 days		45 days

Note: Comparator information derived from Chatham-Kent's survey of several municipalities average processing times (2007).

Table 5 shows statutory and non-statutory plans current status and target dates for completion.

Table 5 - Statutory and Non-Statutory Plans Current Status and Target Dates

Statutory & Non-Statutory Plans / Policies	Status	Target Date (Completion)
Renewable Energy Policies (Lakeshore)	Completed in 2008	
Lakeshore Official Plan	Adopted by Council in 2008	2009 (upper-tier approval)
Comprehensive Zoning By-law	Initiated in 2009	Early 2010
County Road 22 Corridor Study	Initiated in 2009	Early 2010
Advance Blvd Croft Dr. Secondary Plan	Draft completed Feb. 2009	Fall 2009
Community Improvement Plan (CIP)	Draft being prepared	Winter 2010
Planning Services Business Plan	Draft completed	Fall 2009

On January 1, 2007, Bill 51, the *Planning and Conservation Land Statute Law Amendment Act* provided municipalities with new planning tools, powers and legal capabilities to guide development. Bill 51 created a new step in the planning process for most applications. A municipality is now required to decide if an application is complete within 30 days of submission, but only if policies in the Official Plan specify the types of additional information that could be required (the new Lakeshore Official Plan currently awaiting approval from the County of Essex contains these policies). If a positive notice of complete application is given, staff will be directed to prepare and deliver notice of this decision to the applicant and

all required parties and the application moves into the approval process. If a negative notice of completion is given, the applicant must provide the required information before the application is reviewed (this is not the case now). The applicant can appeal the negative notice to the Ontario Municipal Board (OMB) and must demonstrate how the application is complete. If no notice of complete application is given, all parties can submit a motion to the OMB to determine if the application is complete or not. Any OMB decision on the matter is final. When the Town of Lakeshore Official Plan is approved by the County of Essex, staff will be able to implement this process which will reduce staff's time with regard to the review of the application and narrow the gap between the application's submission date and approval date by Council.

Table 6 shows recent meeting / hearing and report activity in Planning Services for the 2008 year.

Table 6 – Meeting / Hearing / Report Activity (Planning Services, 2008)

Meeting	# of Meetings / Site Visits	# of Reports (e.g. 2008)
Committee of Adjustment	16	89
Council Meeting – (*only attended if required)	19	7
Planning Meeting	12	44
Technical Advisory Review Committee (TAR)	12	n.a.
Open Houses	3	n.a.
Other (Secondary Plan, ZBA / County Road 22 / Development Applications, County OP, New Computer System, CIP, Town's OP)	38	n.a.
Site Visits (related to a development application)	127	
OMB Hearings	2	
Total Meetings	102	140
Total Site Visits	127	
*CDS & SMT Meetings not included		

Table 7 shows the Town of Lakeshore's performance measures for effectiveness under the Municipal Performance Measurement Program (MPMP) which is a program that requires municipalities to report service delivery achievement over time.

The MPMP was initiated by the Ministry of Municipal Affairs and Housing in 2000 as a means of improving service delivery to Ontario residents.

Table 7 – Municipal Performance Measurement Program (MPMP)

Performance Measure	2008	2007	2006	2005	Effectiveness Measure	Objective
Location of New Residential Development	91.8 %	93.1 %	96.3%	95.3%	Percentage of new residential units within settlement areas.	New residential development is occurring in settlement areas.
Preservation of Agricultural Land in Reporting Year	100%	100 %	100%	100%	Percentage of land designated for agricultural purposes which was not re-designated for other uses.	Preservation of agricultural land.
Preservation of Agricultural land Relative to Base Year	99.7 %	99.7 %	99.7%	99.7%	Percentage of land designated for agricultural purposes which was not re-designated for other uses relative to the base year of 2000.	Preservation of agricultural land.
Number of Hectares Re-designated During Reporting Year	5	0	14	0	Number of hectares of land originally designated for agricultural purposes which was re-designated for other uses during the reporting year.	Preservation of agricultural land.
Number of Hectares Re-designated since January 1, 2000	154	149	149	135	Number of hectares of land originally designated for agricultural purposes which was re-designated for other uses since January 1, 2000.	Preservation of agricultural land.
Size of Settlement Area	228	228	228	228	Hectares of land in the settlement area as of December 31 of the reporting year.	New residential development is occurring within settlement areas.
Change in Size of Settlement Area	0.0 %	0.0 %	0.0%	0.0%	Percentage change in the size of the settlement area relative to the base year of 2004.	New residential development is occurring within settlement areas.

The processing times and Municipal Performance Measurement Program (MPMP) performance measures allow us to conclude that the Town of Lakeshore’s internal efficiency is at an acceptable level and compares positively with the comparators.

Planning Services should continue to monitor business activity including customer service levels through the implementation of a set of performance measures that would serve to measure the efficiencies and effectiveness of Planning Services. The results shall be compared from year to year and communicated to staff, the community and council and shall include the following performance measures as shown in Appendix 'C'.

The assignment of the approval authority for local official plans, local official plan amendments, plans of subdivision / condominium and part lot control to the County of Essex from the Ministry of Municipal Affairs and Housing presents ongoing challenges for Planning Services staff. It appears that the design and implementation of timely and efficient upper-tier approval processes for the County will be of paramount importance to approvals by Council that also require approval by the County of Essex (See Table 8).

Table 8 - County of Essex Application Approval Dates

File	Application Submission Date	Council Approval	Submission Date To County	County Approval Date
OPA 5 (1999)	July 23/97	October 12/99	Dec. 8/99	Ongoing
37-T-01009	Oct. 18, 2001	Feb. 11, 2002	Feb.28, 2002	Oct. 1,2002
37-T-02009	Dec. 18, 2002	Feb. 24, 2003	Mar. 27, 2003	Mar.8, 2004
PLC-5-2002	Dec.4/2002	December 9, 2002	Dec. 12/2002	Jan. 24, 2003
OPA 8 (2004)	May 20/98	Oct. 30, 2004	Nov. 10/04	Nov. 14, 2006
OPA 11 (2004)	Dec. 10, 2004	Sept. 24, 2007	Oct. 26, 2007	March 23, 2009
37-T-05007	June 16, 2005	Feb. 28, 2006	Mar. 14, 2006	April 5, 2007
OPA 2 (2006)	Jan. 4, 2006	July 17, 2006	Aug. 2, 2006	Ongoing
PLC-2-2006	Sept. 18, 2006	March 26, 2008	April 4, 2008	Ongoing
OPA 3 (2006)	Oct. 25, 2006	March 26, 2007	Apr. 12, 2007	Jan. 11, 2008
OPA 3 (2007)	Feb. 13, 2007	April 23, 2007	May 11, 2007	Ongoing
OPA 4, 5, 6, 10 Wind Farm Policies (2007)	April 4, 2007	July 10, 2007	July 18, 2007	Feb. 17, 2009
OPA 5 (2007)	Oct. 11, 2007	March 26, 2008	April 28, 2008	June 19, 2008
SUB-3-2007	Oct.4, 2007	July 8, 2008	July 22, 2008	Ongoing
OPA 6 (2008)	Dec. 17/98	April 21, 2008	May 27/08	Nov. 26, 2008
OPA 20 (2008)	March 31, 2008	November 24, 2008	Jan. 9, 2009	April 20, 2009
Lakeshore OP	2006	May 26, 2008	Apr. 4, 2008	Ongoing
PLC-1-2009	April 16, 2009	May 12, 2009	May 15, 2009	May 27, 2009

Administration and Council shall identify key contacts at the Ministry of Municipal Affairs and Housing (MMAH) and the Upper-tier (County of Essex) who are empowered to negotiate and facilitate meetings with stakeholders to help resolve outstanding issues. Several Municipalities in Ontario have indicated to the MMAH that accessible key contacts with partner Ministries provided significant support during issue resolution on applications that require Upper-tier approval.

Potential appellants shall be encouraged by Administration to voice their concerns prior to the Notice of Decision / Approval as this gives the Municipality an opportunity to resolve issues and avoid unnecessary appeals to the Ontario Municipal Board.

Staffing & Resources

Table 9 illustrates staffing levels, volume of development applications (in low and high periods) in selected municipalities in Ontario with populations ranging in size from approximately 20,000 to 100,000.

Table 9 - Staffing Levels/Volume of Development Applications (Selected Municipalities)

	Total Planning Staff (*External) 08	2008 Total Dev App's	Total # Dev App's (Highest # in any year (Last 5-10 Years))	Staffing (High Period)	Dev App's / Staff		Population	Population / Staff (08)
					60 (08) (highest)	100		
Kingsville	1.5	90	150	1.5	60 (08) (highest)	100	20,100	13,400
Amherstburg	3 (*1)	56	93	2	18.6	46.5	20,604	6,868
Essex	3	44	106	1.5	14.6	70.6	20,974	6,991
Tecumseh	5	68	102	3	13.6	34	24,197	4,839
Leamington	2	98	143	2	49	71.5	25,210	12,605
LaSalle	3	30	121	4	10	30.2	27,700	9,233
Orangeville	4	60	71	4	15	17.7	27,981	6,995
Stratford	2.5	77	102	2.5	30.8	40.8	31,000	12,400
Innisfil	4	87	n.a.	1	21.7		31,175	7,750
Orillia	9.5	86	118	9.5	9	12.4	30,255	3,184
St. Thomas	5	49	118	6	9.8	19.6	31,571	6,314
Lakeshore	3 (*1.25)	133	241 (excluding multi-consents)	2	31	57	31,644	7,446
Quinte West	10	122	190	9	12.2	21.1	36,910	3,691
Belleville	7	121	135	9	17.2	15	42,300	6,042
Timmins	6	56	115	6	9.3	19.2	43,024	7,170
Haldimand	13	n.a.	n.a.	n.a.	n.a.		43,728	3,363
Welland	7	125	146	6	17.8	24.3	47,236	6,748
Halton Hills	12	168	193	13	14	14.8	51,300	4,275
Caledon	24	276	309	26	11.5	12.8	57,999	2,417
Clarington	24	n.a.	n.a.	n.a.	n.a.		65,902	2,746
Kawatha Lakes	11	313	316	10	28.4	31.6	66,268	6,024
Sarnia	7	167	175	5	23.8	35	71,419	10,202
Bradford	5	77	85	5	15.4	17	93,687	18,737
Kingston	23	210	224	23	9.1	9.7	104,851	4,559
Chatham - Kent County	7 (*2.5)	93	252	7.5	9.7	26.5	108,177	11,387

We conclude from the statistics on “Staffing Comparators” the following:

- ✓ The Town of Lakeshore is the busiest municipality in the County of Essex compared to its member municipalities in terms of the volume of development applications processed during low periods and high periods.
- ✓ For municipalities over 31,000 population to approximately 100,000 population the Town of Lakeshore was busier in their low period than Innisfil, Orillia, St. Thomas, Quinte West, Belleville, Timmins, Welland, Bradford and Chatham-Kent.
- ✓ *For municipalities over 31,000 population to approximately 100,000* the Town of Lakeshore was busier in their high period than Orillia, St. Thomas, Quinte West, Belleville, Timmins, Welland, Halton Hills, Sarnia, Bradford and Kingston.
- ✓ The average number of staff for municipalities of approximately 31,000 people, including Stratford, Innisfil, Orillia, St. Thomas and Lakeshore is 5.05 FTE’s. However, the Town of Lakeshore processes significantly more development applications than these municipalities, typical of larger municipalities such as Chatham-Kent (7 internal FTE’s and 2.5 FTE’s external), Quinte West (10 FTE’s), Halton Hills (12 FTE’s), Kingston (23 FTE’s) and Sarnia (7 FTE’s). Since the Town of Lakeshore’s amalgamation in 1999, the Town has not significantly increased their internal staff complement with the exception of one in-house planner who also acts as Manager despite the Town’s increase in population and workload. Although it is noted that the Town of Lakeshore and the Town of Amherstburg have utilized the services of an outside planning consultant to process development applications. This staffing situation is typical of the majority of Essex County municipalities who on average have a total internal staff complement of 3 FTE’s and have historically concentrated their attention to the processing of development applications rather than on policy development, demographics/statistics, and mapping. The larger municipalities all have development planners and policy planners and undertake significantly more internal land use planning work and policy work than Essex County municipalities which is reflective in the staffing numbers.
- ✓ The average number of staff for municipalities with populations of approximately 36,000 to 50,000 is 9.2 FTE’s.
- ✓ The average number of staff for municipalities with populations over 50,000 to approximately 100,000 is 14.8 FTE’s.

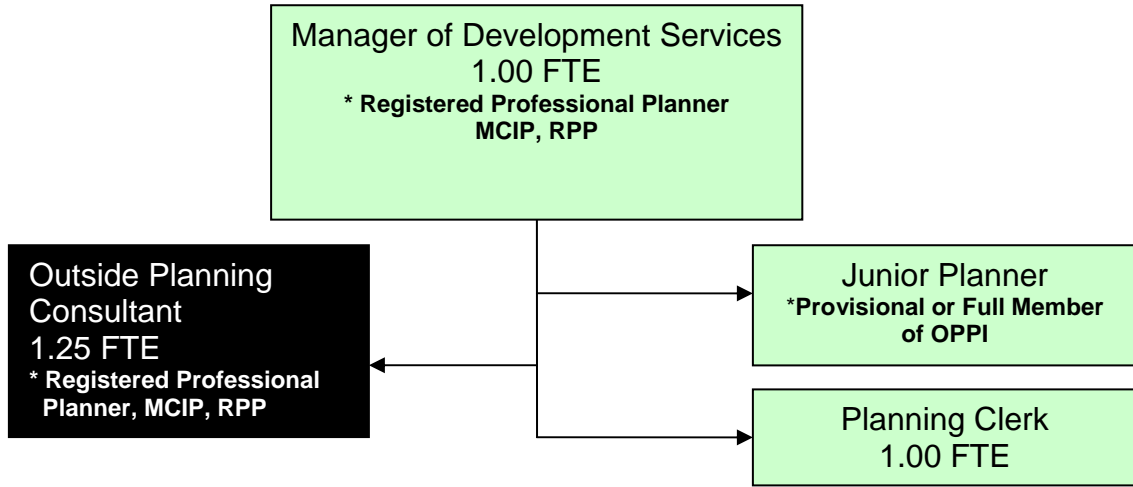
Town of Lakeshore Internal and External Staff (4.25 FTE's)

- Development applications processed per staff member per year in the Town of Lakeshore = 31 (low period) and 57 (high period), and;
 - Population served per staff member in the Town of Lakeshore = 7,446
- ✓ The average number of development applications processed per staff member per year (low period) for municipalities of approximately 31,000 people, including Stratford, Innisfil, Orillia, St. Thomas and Lakeshore is 20.46.
- ✓ The average number of development applications processed per staff member per year (high period) for municipalities of approximately 31,000 people, including Stratford, Innisfil, Orillia, St. Thomas and Lakeshore is 32.45.
- ✓ The average population per staff for municipalities of approximately 31,000 people, including Stratford, Innisfil, Orillia, St. Thomas and Lakeshore is 7,419.

Workforce Planning (Internal Staffing)

An analysis of present workforce competencies and an identification of competencies needed in the future was undertaken for the Planning Coordinator position. Historically, the Planning Coordinator position existed as a position in the former Town of Belle River. The Planning Coordinator acted as the liaison between Belle River Council, the external planning consultant and the County of Essex and coordinated the internal review and administrative processing of development applications. This position was carried over to the Town of Lakeshore at the time of amalgamation (1999) and remains a position in the Town of Lakeshore's Planning Department to date. The current employee in this position has been employed with the former Town of Belle River for eleven years and has been working for the Town of Lakeshore since 1999 and has over the years developed the skill set demanded by the position's current duties. However, it is important to identify the competencies needed in the present but also the future. If this employee decides to leave this position at any point in time in the future or retires, this position shall be dissolved and replaced by a qualified professional planner (junior planner) with full or provisional membership in the Ontario Professional Planners Institute (See Figure 7). This would ensure that the employee in this position would have the skills and competency set to deal with future activities and workloads required of the position, including the ability to write reports to Council / Committees and appear as an expert witness at an Ontario Municipal Board Hearing.

Figure 7 – Succession Planning Model

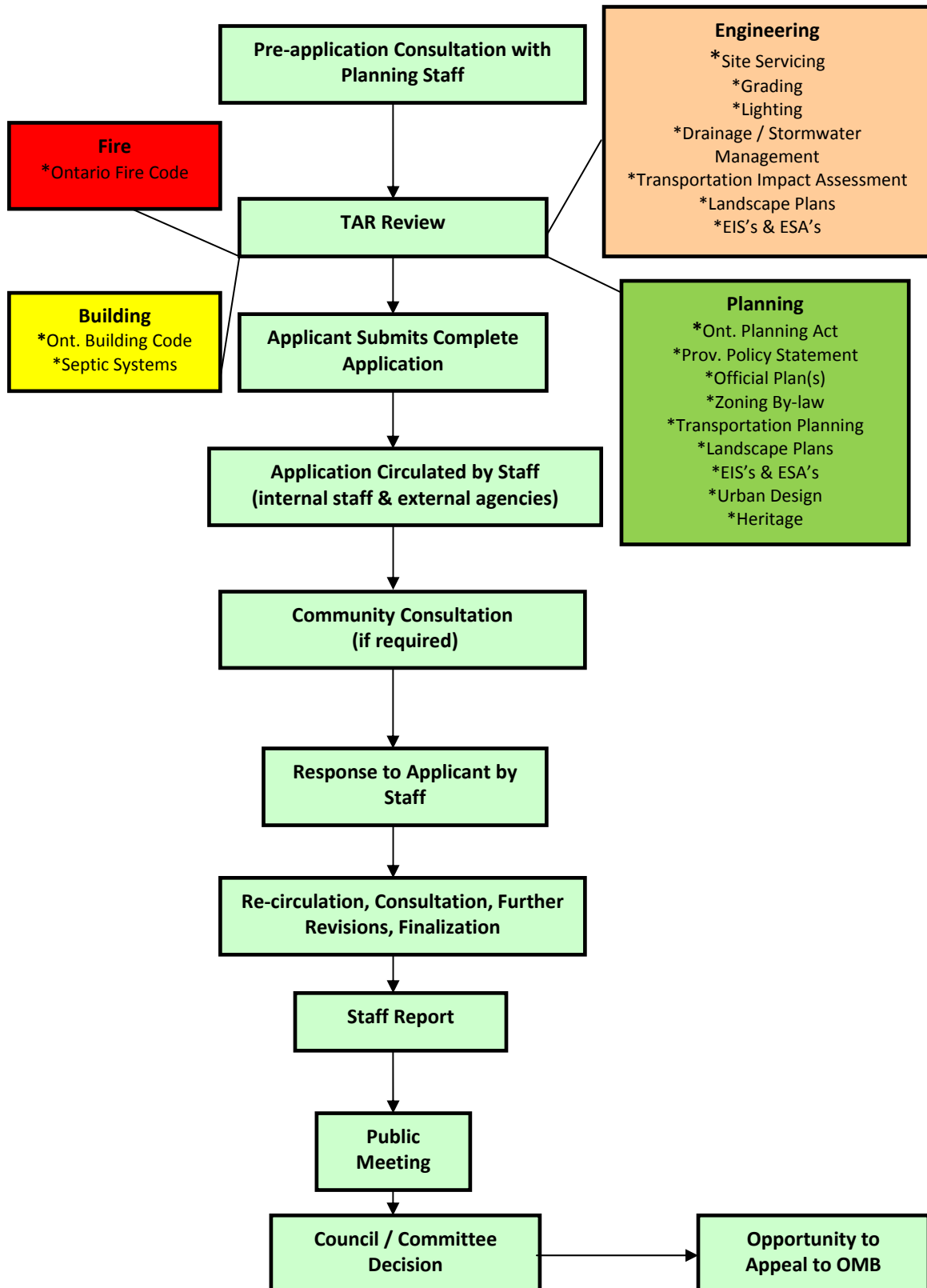


*FTE – Full Time Equivalent

Workforce Linkages (Application Review Process)

The current planning application review process is shown in Figure 8.

Figure 8 - The Planning Application Review Process (Lakeshore)



The planning application process is a key function of the Municipality's plan review function. Due to its nature, it is also a function that comes under question. Statistically, the planning application review process performs well, however a number of operational changes to the planning process can be made across the entire process to develop a better understanding by all stakeholders, increase transparency, and ultimately resident satisfaction with the process (See Appendix 'D').

Budget and User Fees

Table 10 shows Planning Services financial information from 1999 to 2009.

We can conclude from this information that wages and benefits and the consulting Planner's budgetary amount account for the majority of Planning Services budget throughout the decade.

In addition, studies and plans that have to be budgeted for by Planning Services are either market driven such as secondary plans or are a legislative requirement such as updating the Official Plan (five year review) and Zoning By-law. Secondary Plans should be completed by the developer / applicant if at all possible to avoid the Town absorbing the cost for these studies.

With regard to the Planning Consultant's budgetary amount, invoices are prepared by the consultant to the Town. The Town codes all invoices with the appropriate planning file account or consultant account. The consultant's charges are either cost recoverable for the Town and paid for by the applicant or they are paid for by the Town of Lakeshore as follows:

Non-recoverable Costs:

Charges are applied to the planner's account. These charges currently include: the consultant's attendance at TAR (Technical Advisory Review Committee), general consulting charges (not related to a submitted application), consent and minor variance applications, telecommunication facility applications, part lot control applications, lawyer letters and Ontario Municipal Board costs. (For wind farm applications and Committee of Adjustment applications the applicant is currently responsible for any costs incurred by the municipality for appearing in support of these applications at any Ontario Municipal Board Hearing).

Recoverable Costs:

Costs are paid by the applicant for a plan of subdivision / condominium, official plan amendment, zoning by-law amendment, site plan and wind farm.

Table 10 – Planning Services Financial Information (1999 to 2009)

Town of Lakeshore Planning For the year ended December 31											
Account Description	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	Budget 2009
Wages & benefits	90,014	98,007	92,815	98,596	104,484	110,046	148,311	197,474	164,265	171,747	243,716
Outside Planning Consultant	66,972	86,717	128,098	153,418	132,738	134,302	168,536	74,727	68,682	57,564	40,000
Other costs	5,387	6,179	5,069	5,040	1,028	8,119	12,976	15,028	7,605	19,609	16,100
Legal	25,840	55,417	13,649	4,126	3,406	3,060	1,371	51	56	0	-
Other consultants		1,574					8,156	7,100	7,446	1,997	5,000
Inter-department Labour	68,634	70,693	72,814	74,999	77,249	79,566	81,953	84,412	86,944	89,552	92,239
Direct Planning costs	256,847	318,587	312,445	336,179	318,905	335,093	421,303	378,792	334,998	340,469	397,055
Overhead Allocation	162,212	167,079	172,091	177,254	182,572	188,049	193,690	199,501	205,486	211,650	218,000
Committee of Adjustment	17,865	23,057	20,175	23,096	19,649	21,621	21,252	21,621	23,290	23,709	23,625
Total expenditures	436,925	508,723	504,711	536,529	521,125	544,763	636,245	599,914	563,774	575,829	638,680
Total revenues	113,200	100,885	68,612	158,530	124,250	164,784	69,416	42,235	65,579	114,850	111,245
Net planning costs	323,725	407,838	436,099	377,999	396,875	379,979	566,829	557,679	498,195	460,979	527,435
% of direct costs recovered	41	30	21	44	37	46	16	11	18	32	26
% of all costs recovered	26	20	14	30	24	30	11	7	12	20	17
% overhead to direct costs	63	52	55	53	57	56	46	53	61	62	55
Development Charges By-law						6,920	193,822	47,881	15,134		
Secondary and official plans	0	4,615	1,642	-1,643	0	0	13,641	214,502	172,003	96,269	104,000
Computer software											55,000
Special project costs	0	4,615	1,642	-1,643	0	6,920	207,463	262,383	187,137	96,269	159,000

Table 11 shows recent planning consultant charges for all application types. Time spent on each application reflects the consultant's time only not Administration's. Until the Manager of Development Services took over the processing of consent and minor variance applications the Town had to absorb the consultant's charges for consent and minor variance applications as they were not recoverable under the current 'tariff of fees' By-law. All other charges relating to any other application were recoverable from

the applicant with the exception of some Ontario Municipal Board charges related to a particular application.

Table 11 – Typical Fees Charged By Application Type (Outside Consultant)

Application Type	(High)	Typical Cost	(Low)	Time Charged (Hours)
Minor Variance	\$455.00	\$300.00	\$250.00	2.5 to 4.5 hours
Consent	\$500.00	\$300.00	\$250.00	2.5 to 4.5 hours
Re-zoning	\$6,000.00	\$1,500.00	\$1,200.00	10 to 25 hours
ZBA / OPA	\$7,000.00	\$2,700.00	\$2,000.00	15 to 30 hours
Site Plan - Major	\$3,000.00	\$1,500.00	\$1,000.00	5 to 15 hours
Site Plan - Minor	\$1,200.00	\$700.00	\$500.00	3 to 10 hours
Subdivision	\$9,000.00	\$4,000.00	\$3,000.00	30 to 50 hours

Appendix ‘E’ shows the results of a recent survey of user fees undertaken by Administration for planning applications in selected municipalities in Ontario. The statutory authority to impose fees under planning applications is granted to the Town of Lakeshore through Section 69 of the *Planning Act*. Municipalities are required to pass By-laws for the purpose of collecting fees related to processing of planning applications.

The *Planning Act* authorizes that the fees charged can only cover the anticipated costs of processing such applications. Planning fees cannot be used to create a reserve fund for Ontario Municipal Board appeals as this is prohibited under the *Planning Act* and there is a mechanism for costs to be assessed by the Ontario Municipal Board itself. No notice is required to be given under the *Planning Act*. However, an applicant may pay the fee under protest and appeal to the Ontario Municipal Board. Proposed fee increases may be driven by adjustments to achieve full cost recovery, or for inflation, as well as changes based on policy objectives or like service comparison. In most cases, the determination of fee increases is driven by cost recovery and an assessment of like fees in other jurisdictions and the impact on services and service recipients.

A review of user fees in selected municipalities in Ontario reveals the following:

- ✓ The Town of Lakeshore and other County of Essex municipalities fees for processing development applications have not historically covered administrative costs as determined through various discussions with municipalities;
- ✓ The Town of Lakeshore’s fees are comparative to other County of Essex municipalities;

- ✓ Some municipalities have increased their fees over the years to account for inflation or to achieve policy objectives or to be competitive with area municipalities, but have not implemented full cost recovery of fees to date;
- ✓ Some municipalities such as Halton Hills, Milton, Collingwood, Springwater, Ajax and Chatham-Kent have implemented or have tried to approach full cost recovery of fees;
- ✓ Many municipalities have adjusted their fees to reflect the costs related to the complexity of the application, for example, implementing fees for major and minor applications, residential verses non- residential, and fees based on gross floor area, number of units and number of lots. Our outside consultant charges for planning application review shows that there is justification for the Town to implement application fees that reflect the complexity of the application and the amount of work involved. The only applications in which fees are currently implemented based on the complexity of work is for site plan applications. However, the criteria to determine whether a site plan is major or minor is not defined in the current fee By-law, and;
- ✓ Many municipalities are charging additional fees for legal review, engineering review, septic review, agreement preparation, advertising, OMB costs, additional open houses and public meetings and fees for all services provided by the municipality.

Property taxes represent the majority of the Town’s revenue sources. As the community continues to grow the demand for increased services will be difficult to provide without additional support from the tax base. Inflationary impacts also create a burden on the tax base. Previously there was a cross subsidization in the development approvals process where planning fees could be subsidized by building permit fees creating an overall balance within Planning Departments. *Bill 124* states that this imbalance can no longer occur and building permit fees can only recover costs specifically related to tasks under the *Building Code Act*. In order to mitigate the pressures on property taxes, additional revenue opportunities could be sought. A reasonable alternative funding source is charging a fee for services that are provided to individuals who receive some material benefit from the service.

Advantage of User Fees

- ✓ It promotes equity within the community by passing the cost of services directly to the users benefiting from the service;
- ✓ Reduces the burden on the property tax revenues for the provision of services that benefits only a specific group;

- ✓ User fees are effective in allowing for improved allocation of public resources (users decide whether a service has value or benefit to them and if the value or benefit is worth the fee levied);
- ✓ The Town is able to monitor participation levels and demand for services and determine which services are important to the community (fees can be adjusted), and;
- ✓ Property taxes are not used to subsidize the service.

Disadvantage of User Fees

- ✓ Create a burden on low income individuals who may need the service but cannot pay for it;
- ✓ When user fees are the funding source, there is no guarantee of maintaining revenues at a level where cost are fully recovered, and;
- ✓ User fees create an unfair burden (some people feel that municipal property tax based on property ownership is a more equitable method of cost recovery than user fees).

The Business Plan Committee carried out a “fee for service analysis” associated with the review services provided by the Town with respect to development applications under the *Planning Act*, the *Building Code Act* and the *Municipal Act*. The process at arriving at a proposed fee schedule generally entails a detail examination of the plan review function, from staff’s initial contact with the proposal, through to application submission, file creation and assignment, file circulation, technical review and commentary, contact with the public through open houses and public meetings where applicable, as well as the preparation of technical comments, reports, agreements, related correspondence and all other applicable plan review functions including review of subsequent iterations of proposals stemming from previous comments, approvals, inspections, etc. This exercise is typically undertaken in consultation with all applicable internal Departments including Planning, Engineering, Building, Environmental Services, Finance and Fire in order to arrive at the direct costs associated with plan review. Direct costs include all those that can be directly related to a service such as staff time, materials and supplies, facility costs, etc. Indirect costs include program related costs that cannot be directly attributed to any specific program such as technology, financial services, purchasing, etc. Indirect costs would be factored, including overhead and the proportion of the overall overhead costs. The overall intent is to arrive at the actual costs of municipal plan review in order to arrive at a cost recovery approach to a municipal plan review fee structure. This information, together with benchmarking of cost of neighbouring municipalities and the ability of the community to pay the fees would be used to help set new rates and fees for the Town as follows (See Appendix ‘F’).

In a typical year, the percent of all direct costs recovered by the municipality is estimated to be approximately 50 %. Proposed fee increases are recommended to be phased in over a two year period with six months notice to the public / development industry. Application fees shall be automatically (annually) indexed to inflation.

Service Delivery Models

Alternative review models currently in use by municipalities in Ontario to carry out their plan review and approval functions include:

1. In-house expertise (in- house development planners, policy planners etc.);
2. Enhancing in-house expertise (supplement staff resources by ‘contracting out’ all or part of the plan review function);
3. Expertise in other agencies or municipalities (seek land-use planning and technical advice and support from other agencies, e.g. Conservation Authority or Upper Tier Planning Authority);
4. Peer review (hire an outside consultant to review selected technical reports submitted in support of a development application);
5. Municipal tendering of technical reports, and;
6. Advisory group to council.

Source: Ministry of Municipal Affairs and Housing

The three main service delivery models utilized in Ontario Municipalities today are the first three noted in the list; ‘In-House Model’, ‘Contracting Out Model’ and the ‘Seeking Expertise Elsewhere Model’.

The ‘Seeking Expertise Elsewhere Model’ is not relevant for discussion here given:

- The volume of development applications in the Town of Lakeshore;
- A poorly conceived and poorly operating two-tier system with limited qualified professional staff available for municipal reviews, and;
- A Conservation Authority that is already stressed with limited professional staff available for municipal reviews.

The other models of service delivery listed above can be described as supplementary or secondary models of providing planning services which are utilized everyday in many planning departments in Ontario.

In-House Model

Some municipalities utilize in-house technical experts for plan review and approval especially in areas with significant development activity. This model of service delivery is the most common model currently in use in municipalities in Ontario.

Given the development characteristics and activities which can reasonably be expected over the long term, the Town of Lakeshore would require a staff of 7 FTE's, 3 or 4 whom would be professional planners, in order to address long-term policy matters and day-to-day development review activities in accordance with the following rational (See Table 12):

- Professional planning staff: (1 staff per 9000 population X 36,000) = 4
- Total staff requirement: (1 staff per 5000 population X 36,000) = 7

Using the number of applications as opposed to population based on an average annual number of applications:

- Total staff requirement: 1 staff per 14.9 applications X 104 applications = 7 staff.

There are a number of factors concerning the Town of Lakeshore which should be taken into account when estimating the necessary size of a full service in-house model:

- ✓ Lakeshore is geographically large with a diverse economy, environmental conditions, and a wide assortment of settlement types;
- ✓ Due to poor infrastructure planning in the past, Lakeshore has serious servicing issues in most of its area of designated growth;
- ✓ Being in part an urban fringe municipality, it has to deal with regional growth factors and urban sprawl, and;
- ✓ Strong regional planning is needed, but not likely to occur soon. This leads to increased friction between jurisdictions and delay.

Source: Storey Samways Planning Ltd.

Table 12 – Costing ‘In-House Model’

Position	Full-Time Employees (FTE)	Salary (min.) & Benefits
Professional Planner	3	\$228,000
Planning Clerk	3	\$177,000
Manager	1	\$102,000
Additional Costs:		\$20,000
Desks, chairs, office supplies, file cabinets, computer equipment, travel and expenses, memberships and publications.		
Workspace is limited in the existing building (Office Space Rental \$1,500 a month).		\$18,000 (per / year)
Total:	7 FTE's	\$545,000

Advantages:

- Increased accessibility to planning staff for the public;
- Level of support for short term absence, due to vacation, illness or OMB Hearings;
- Reduced cost related to outside peer review of some technical reports;
- Reduced costs associated with special studies that can now be done in-house;
- More efficient and productive department;
- Housekeeping matters are dealt more efficiently on a day to day basis;
- Increased communication internally (no outside review);
- Better able to meet report deadlines;
- Workload is more evenly distributed among staff according to skill level;
- Staff is readily available to work on policy matters.

Disadvantages:

- More expensive to operate the department initially, especially during times of budgetary constraint and lower activity;
- Concerns regarding over or under staffing;
- Succession planning concerns;
- Transition issues may be increased with new staff or staff moving on.

Contracting Out Model

Some municipalities have decided to supplement staff resources by ‘contracting out’ all or part of the plan review function. Typical of municipalities that do not have the in-house resources or technical experts to fully undertake the plan review and approval function.

This model presumes development review services will be undertaken by a planning firm experienced in such work and with a local presence. The firm can be compensated in different ways, such as a combination of flat fees and hourly rate. In a typical year about two-thirds may come from flat fees.

Advantages:

- Since the municipality knows what its expenses will be for any particular type of application, it can accommodate whatever cost recovery model it desires. For example, a 100% cost recovery model for development applications;
- The Municipality would have a performance guarantee through a contract;
- The Municipality receives the right amount of services, i.e., there are no concerns regarding under or over staffing;
- Succession planning issues are much reduced;
- Transition issues are reduced, best exemplified by Lakeshore’s own experience;
- The level of support required for short term staff absence, due to vacation or illness, is readily available;
- Normally, due to experience in other municipalities, the planning contractor can provide additional insight and a mentoring function to a municipal planning department;
- The contractor can provide professional service for small studies which need to be completed in short order;
- The contractor can provide experienced assistance in special circumstances, such as tribunals, i.e., the OMB.

The basis for ensuring the relationship between a planning services contractor and a municipality is a well-considered contract which clearly, and in detail, describes the quality and amount of work expected by the contractor; the remuneration; performance standards; and performance review. Contract length typically works best of both parties at 5 years.

Disadvantages:

- Accessibility or availability of the consultant;
- Additional costs – (not recoverable or unforeseen costs);
- Response / turnaround time could be longer if the consultant is busy with other projects;
- Communication may be hampered by the consultant not attending meetings etc., and;
- Additional work for planning staff (everything has to be copied, faxed or scanned, e-mailed to the consultant).

SECTION C: CONTEXT

Assumptions

The following has been assumed in the Business Plan:

- Planning Services has not kept up with procedural changes required by recent legislation *Bill 51* and *Bill 130*;
- Essex County's historical pattern of high and low economic and population growth will continue;
- The C.N. Watson report (Population, Household, and Employment Forecast) is accurate in its analysis;
- The Official Plan will be approved by the County of Essex;
- The Consolidated Zoning By-law will be adopted;
- Performance indicators are accurate;
- Financial information is accurate;
- Comparative staffing information is accurate, and;
- Comparative user fee information is accurate.

Scope & Boundaries

The present analysis and recommendations takes into account the recent decline in economic and population growth. However, Planning Services must also consider the recent forecasts by Lapointe Consulting (2008), EDP Consulting (2008), the Ministry of Finance (2007/2008) and C.N. Watson and Associates (2006) that suggest that the present state of the economy may be short-term and that over time the economy will improve (Source: Building Services Business Plan, 2008).

N. Barry Lyons Consultants (2009) Limited notes that the Provincial Economy will begin to recover by 2011-2012, with the Windsor-Essex Economy lagging slightly, likely not returning to pre-2004 levels until after 2016.

Sources of Information

The Business Plan used the following resources as sources of information:

- The City of Leduc Business Plan (Business Planning Framework), February 2002;
- Chatham-Kent Business Plan, 2007
- Building Inspection Services Business Plan, June 10, 2008;
- Town of Lakeshore Official Plan, May 26, 2008;
- C.N. Watson and Associates (2006), Population and Employment Forecast;
- Windsor-Essex Development Commission;
- IMPCC Annual Report (2008);
- Ministry of Finance (website);
- Ministry of Municipal Affairs and Housing (website);
- Storey Samways Planning Limited;
- Building Services (Lakeshore);
- Financial Services (Lakeshore);
- Engineering Services (Lakeshore);
- Human Resources (Lakeshore);
- Planning Coordinator (Lakeshore);
- Meridian Planning;
- Monteith Brown Planning Consultants
- DMA Planning and Management Consultants;
- City of Toronto Planning Department;
- London Borough of Merton;
- N. Barry Lyons Consultants;
- Town of Ajax;
- Various Municipalities in Ontario.

Non-Financial Information

The Town of Lakeshore is accountable for protecting provincial policy interest as set out in the *Provincial Policy Statement (PPS)* and for ensuring conformity with their Official Plans. The Town of Lakeshore must ensure that it has the technical expertise and support to carry out its plan review and approval responsibilities.

Financial Information

Planning Services total expenditures have historically been quite a bit higher than our revenues, which is typical of many Planning Departments in Ontario where the community feels that municipal property tax based on property ownership is a more equitable method of cost recovery than user fees.

The Business Plan is recommending that the Municipality move towards considering additional cost recovery of Planning Services functions. Application Fees shall automatically (annually) be indexed to inflation.

SECTION D: RECOMMENDATIONS

Committee of Adjustment, Land Use Planning, Long Range Planning Services

- ✓ **Recommendation:** Maintain the current service delivery structure with documented performance measures and ongoing communication of performance measure results.

External Challenges

- ✓ **Recommendation:** Planning Services must meet the challenge of establishing a stable revenue base for planning and development functions and shall move towards additional cost recovery of Planning Services functions through the introduction of a new fee schedule for services rendered;
- ✓ **Recommendation:** Planning Services shall review its public participation programs and initiatives to ensure adequate involvement of Lakeshore citizens in community planning matters;
- ✓ **Recommendation:** Planning Services shall review its current staffing capabilities and capacities with respect to annual volume of development applications and diversity of work, and;
- ✓ **Recommendation:** Planning Services shall ensure easier access to staff reports, by-laws and support documents on the Town's website.

Performance Measures

- ✓ **Recommendation:** Planning Services shall ensure the development of a performance measure for participant and resident satisfaction with the community planning process and ongoing communication of performance measure results;
- ✓ **Recommendation:** Planning Services shall ensure the documentation of performance measures outlined in Appendix 'C' and the ongoing communication of performance measure results;
- ✓ **Recommendation:** Statistically, the planning application review process performs well, however a number of operational changes to the planning process can be made across the entire process to develop a better understanding by all stakeholders, increase transparency, and ultimately resident satisfaction with the process (See Appendix 'D'), and;

- ✓ **Recommendation:** Planning Services shall ensure ongoing communication with the County of Essex to achieve timely upper-tier approvals for local official plans, local official plan amendments, plans of subdivision / condominium and part lot control.

Budget

- ✓ **Recommendation:** Planning Services shall continue to ensure that the only costs that are charged to the consulting Planner’s account shall be costs that cannot be recoverable from the applicant, such as the consultant’s attendance at TAR (Technical Advisory Review Committee) and general consulting costs not related to a submitted application;
- ✓ **Recommendation:** Secondary Plans and supporting studies shall be completed by the developer / applicant if at all possible to avoid the Town absorbing the cost for these studies, and;
- ✓ **Recommendation:** Planning Services Business Plan Committee is recommending that the Municipality move towards additional cost recovery of Planning Services functions.

User Fees

- ✓ **Recommendation:** That all external costs associated with a plan review are charged back 100% to the applicant;
- ✓ **Recommendation:** That Planning Services meet the challenge of establishing a stable revenue and operating base for planning and development functions and recommend that fee increases for all services provided by the municipality be implemented and phased in over a two year period, including application review and additional fees for pre-consultation, legal review, engineering review, septic review, agreement preparation, advertising, additional open houses or public meetings and Ontario Municipal Board (OMB) costs etc., and;
- ✓ **Recommendation:** That fees are automatically (annually) indexed to inflation.

Service Delivery Model

- ✓ **Recommendation:** That the Town maintain their overall approach and service structure given the current economic climate. By retaining the current service delivery model (on an “as needed basis”) management is better able to closely align its work priorities and activities of staff with the circumstances of the local economy. The current service delivery model provides the flexibility for a more efficient review of development applications during both low periods and high

periods of work, while at the same time minimizing costs to the municipality during times of budgetary constraint. However, performance measures should be communicated to staff, council and the community and be the basis for service expectations. Poor performance measures/indicators may indicate the need to consider hiring additional internal staff or may be the trigger to review the efficiency of the current service delivery model and the need to transition to a different model of providing planning services. At the end of each year, performance measure tools will be used to obtain feedback on the impact of and efficiency of the current service delivery model;

- ✓ **Recommendation:** That the existing internal staff complement of 3 Full Time Employees (FTE's) and external staff complement of 1.25 FTE's be maintained in order for the municipality to provide for the most effective cost delivery of municipal services as mandated under the *Planning Act* and *Building Code Act*. As indicated by the survey on comparative staffing any inappropriate downsizing of staff would lead to negative consequences for the Town's ability to carry out its plan review functions in an efficient manner;

- ✓ **Recommendation:** An analysis of present workforce competencies and an identification of competencies needed in the future was undertaken for the Planning Coordinator position. If this position becomes vacant at any point in time in the future this position shall be dissolved and replaced by a qualified professional planner (junior planner) with full or provisional membership in the Ontario Professional Planner's Institute;

- ✓ **Recommendation:** That the benchmark service level of 170 applications be the 'trigger' to review additional internal staffing requirements (this figure is based on the average volume of development applications observed from 1999-2008 and an analysis of current workloads in the Department). As indicated by the survey on comparative staffing during both high and low periods of development activity in the Town of Lakeshore, any inappropriate downsizing of staff and resources would lead to negative consequences for the Town's ability to carry out its plan review functions in an efficient manner. Planning Services requires highly trained, professionally accredited staff to ensure that the Town is accountable for protecting provincial policy interest as set out in the *Provincial Policy Statement (PPS)* and for ensuring conformity with their Official Plans.

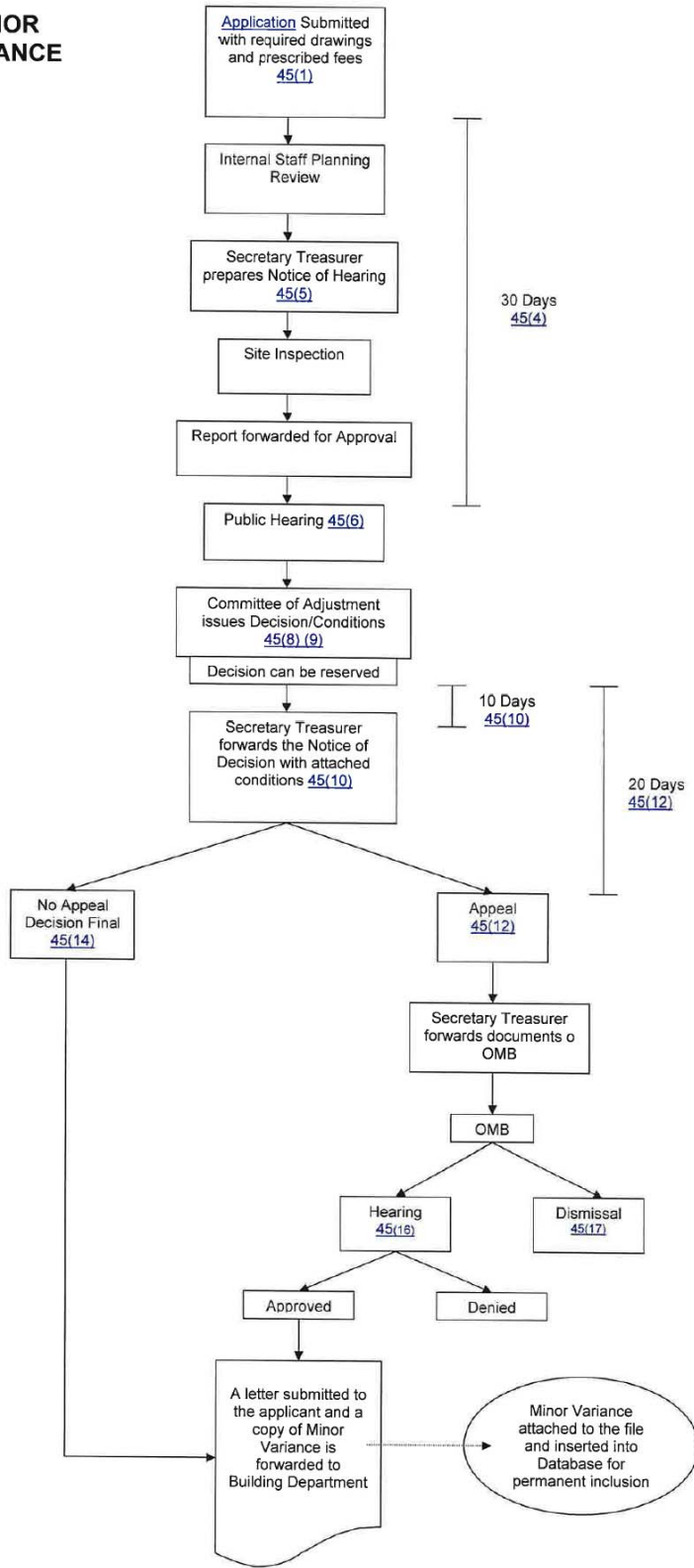
Conclusion

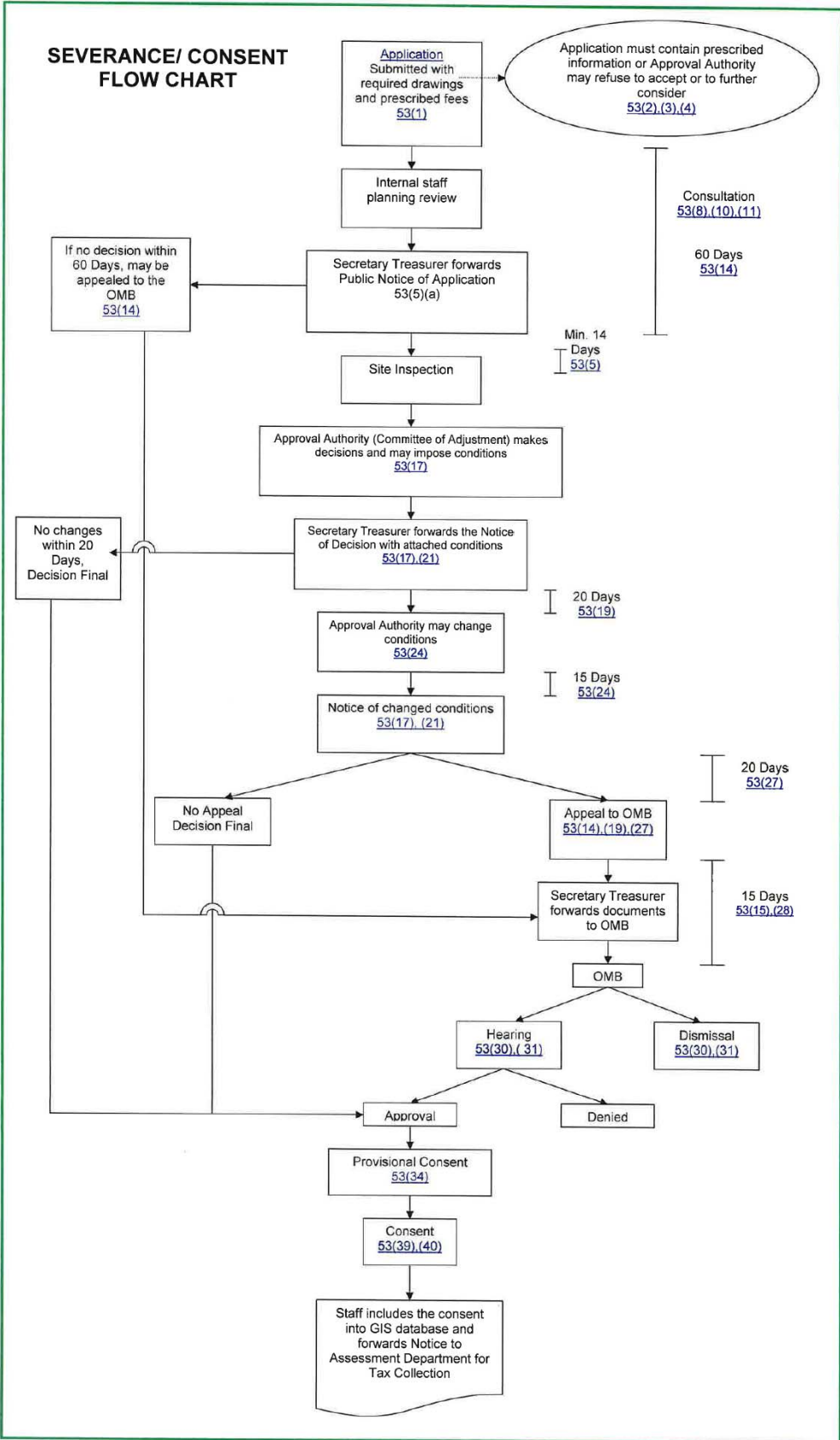
The Town of Lakeshore has adopted an innovative service delivery model with a potential to contribute to a healthy, vibrant and efficient community. Although this report recommends that the Town maintain the overall approach and service structure and current staff complement in the interim, this review supports the retention of the major elements of the current structure, but it also recommends several significant

adjustments, such as the development and use of performance indicators to enhance and monitor the current model during high and low growth periods in the Windsor-Essex Area. Management needs to closely align its work priorities and activities of staff with the circumstances of the local economy. The current service delivery model provides the flexibility for a more efficient review of development applications during both low and high periods. Work priorities can be better balanced between the outside planning consultant and in-house staff especially during high periods of work. Costs for an outside planning consultant can be significantly reduced for the Town by the applicant absorbing the costs associated with the processing of any development application and in-house staff undertaking any work that is not considered cost recoverable. Planning Services has already adopted this approach.

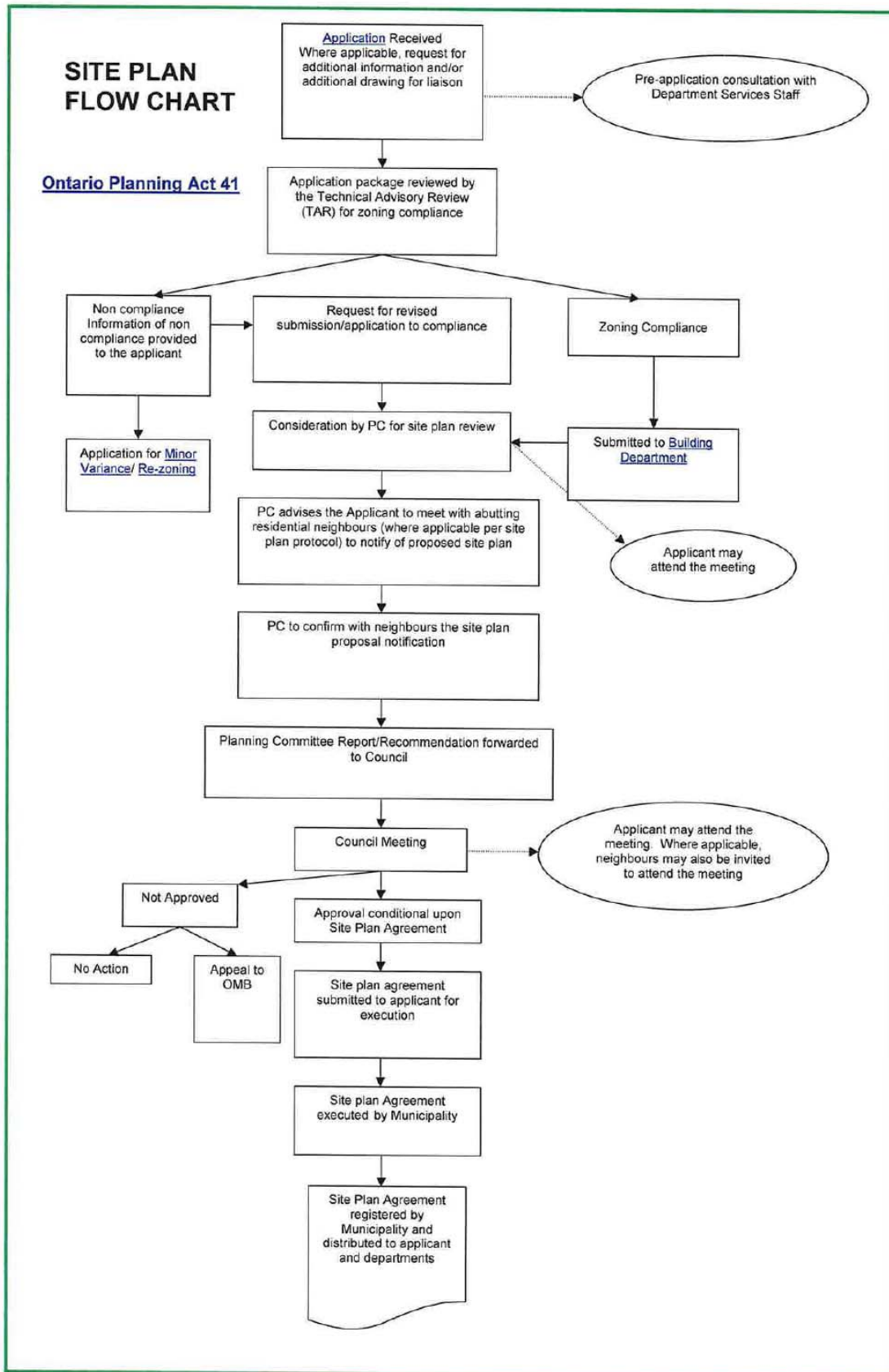
Appendix A

MINOR VARIANCE

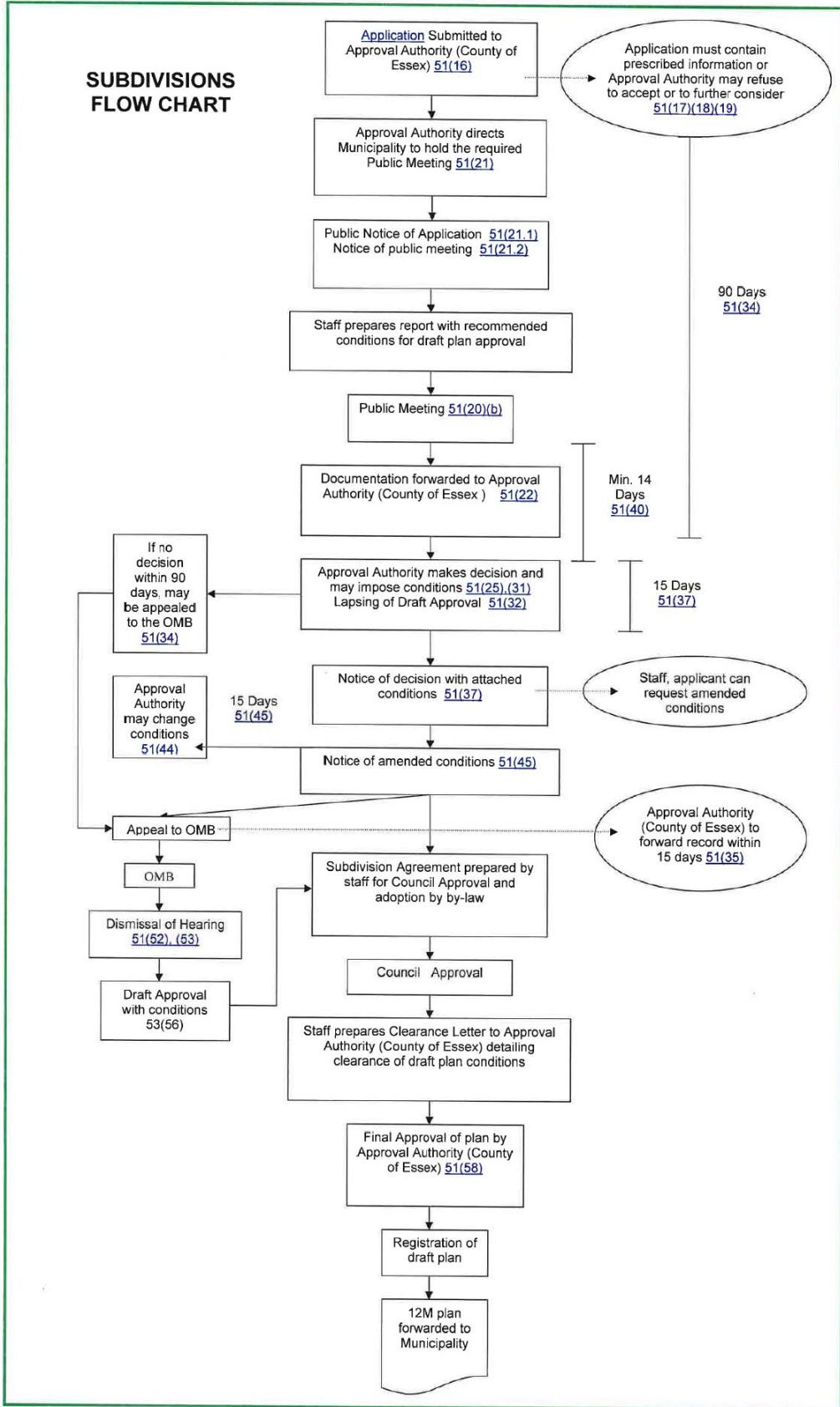


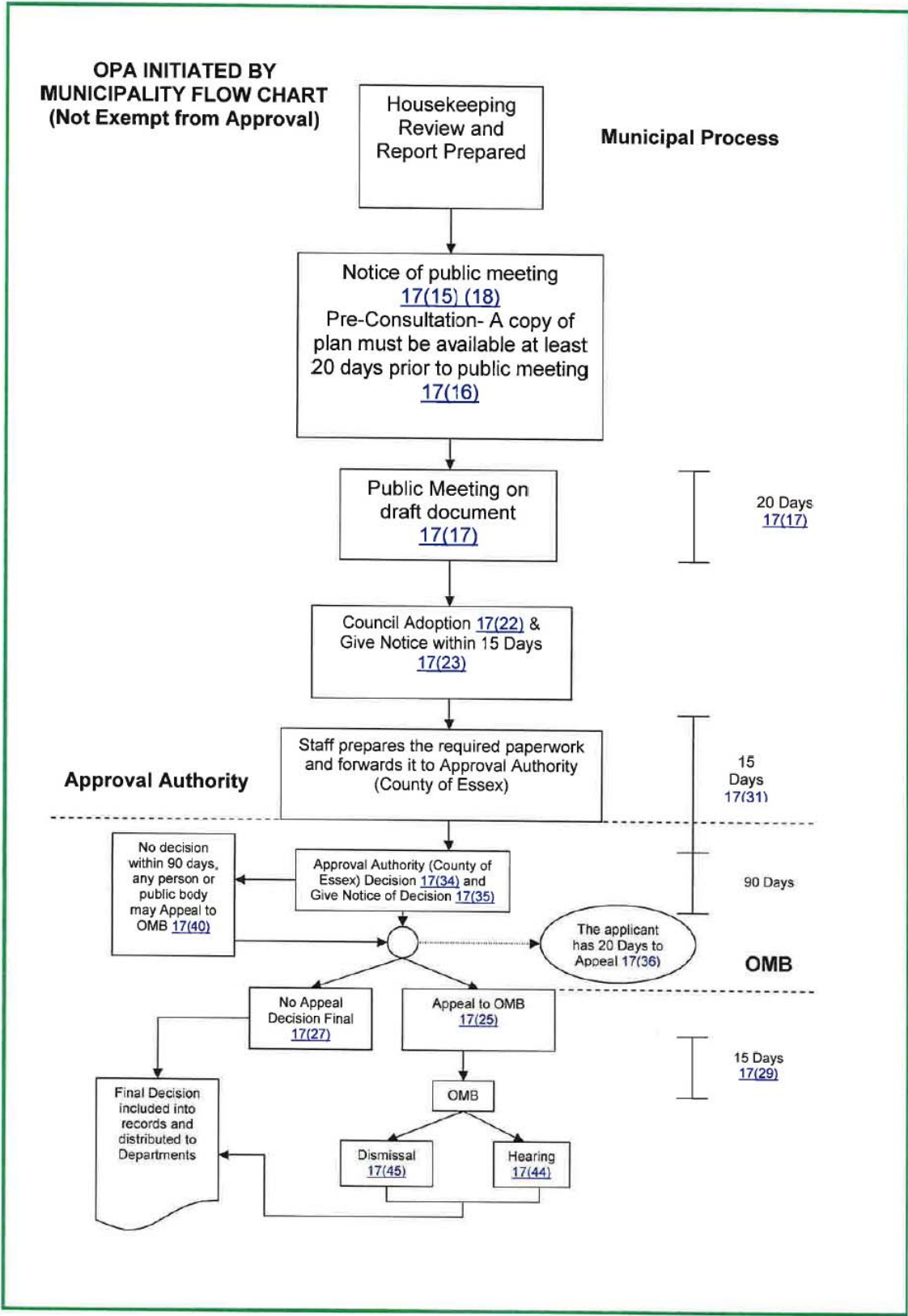


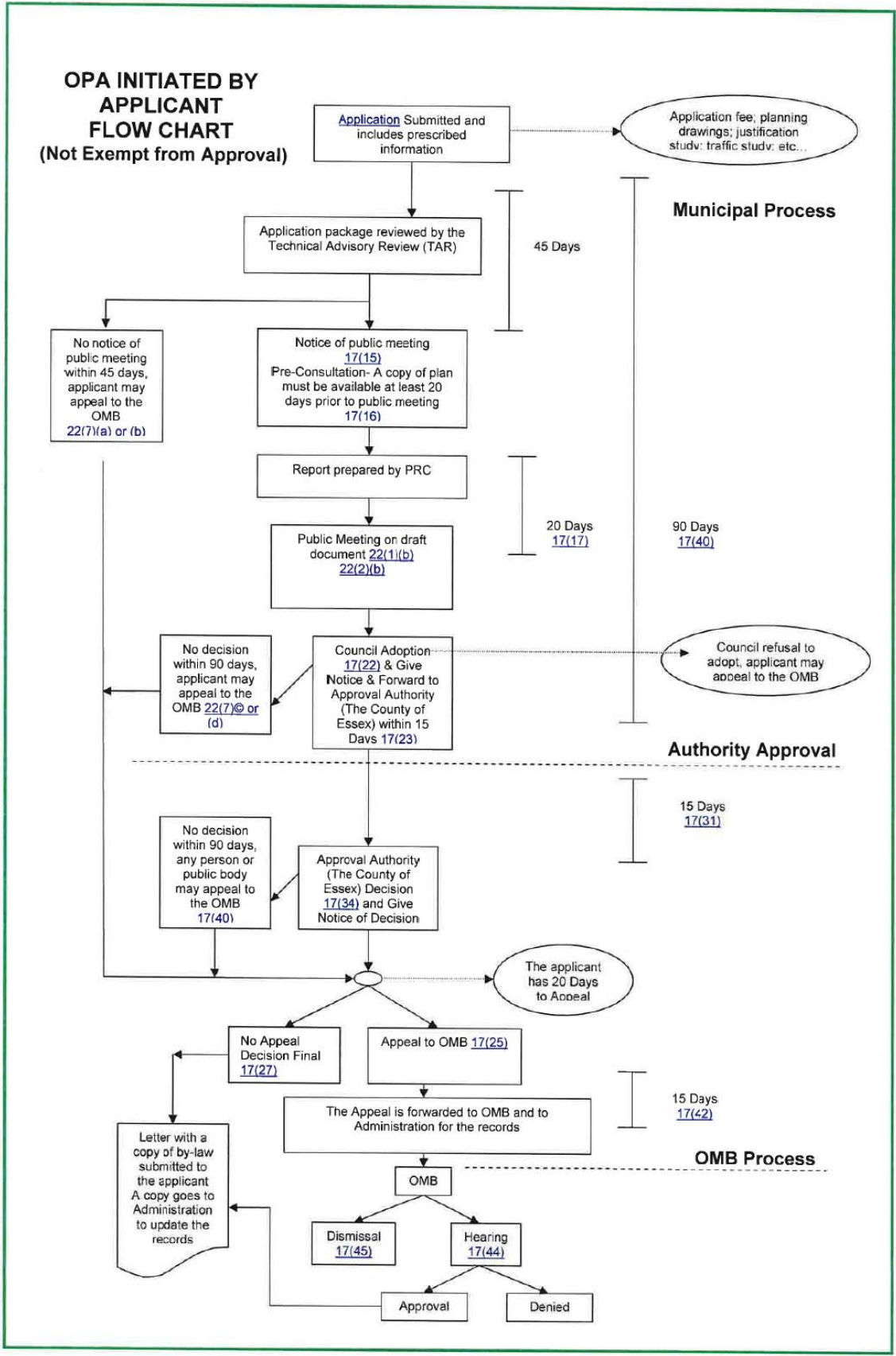
Appendix B



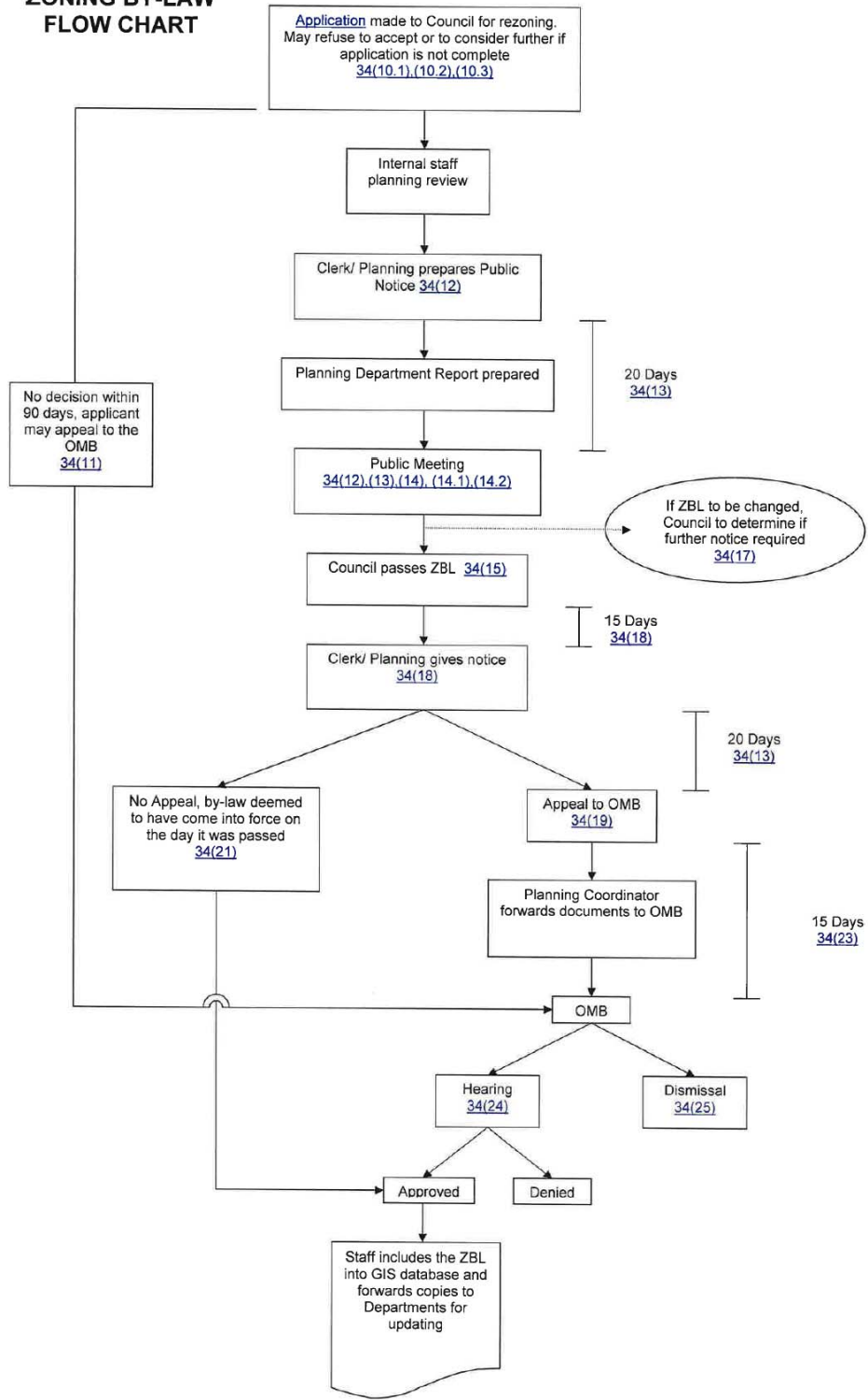
**SUBDIVISIONS
FLOW CHART**







ZONING BY-LAW FLOW CHART



Appendix C

Performance Measures (Planning Services)

- Complaints or problems reported (# and type of complaint)
- Complaints from applicants, or processing errors (#)
- Development applications (#)
- Reports to Council / Committees (#)
- Meeting Activity (#)
- Appeals to OMB (#)
- Policy Initiatives completed within established time frames (yes / no)
- Records up-to-date and easily accessible (yes or no)
- Staff reports to Council / Committee within statutory deadline (yes / no)
- Reports, accurate and completed according to established time frames (yes / no)
- Reports endorsed by Council / Committees
- Compliance with *Planning Act* processes (yes / no)
- Processing times for applications (time in days)
- Annual report completed (yes / no)
- Administrative reviews processed on time and responded to appropriately (y/ n)
- Changes made to the Official Plan and schedules accurately / efficiently (yes / no)
- Changes made to the zoning by-law and map accurately / efficiently (yes / no)
- Prepare electronic filing (yes / no)
- Municipal Performance Measurement Program (MPMP) performance measures complete and accurate (yes / no)
- Phone calls returned within 24 hrs (yes / no)
- Information requests returned within 48 hrs (yes / no)

Appendix D

Recommended Operational Changes (Planning Application Process)

Recommendation	Objective	2009	2010	2011	2012
Planning Services should consider developing a “handbook” for residents, council / committees and developers which can be posted on the website.	To better develop a key understanding of the policies that shape our decisions. This can include information on the planning process for each application and include information about their role, outline protocols for speaking a meetings and discussing concerns with the Planning Department.		X		
Planning like all specialist areas has its own “language” which can be confusing and frustrate members of the public.	Effectively communicate information to the public in a clear and easily accessible format. Planning Reports use clear language to describe relevant planning issues, policies and the responses to public concerns. Simplify the language in public notices.	X			
Develop a “protocol” for TAR which outlines procedures for meetings including attendance.	To ensure a general understanding of rules, procedures and regulations regarding the operation of successful and informative TAR meetings.		X		
Develop “work procedures” for internal (departmental) and external (agency) review and processing of development applications. Ensure formal communication mechanisms between Departments and within Departments to support clarification of roles, responsiveness and resources. Enhance initiatives that will track service requests.	To establish protocols and timelines for review and processing of development applications. Responsibilities and accountabilities as well as inter-departmental responsibilities are not always clear.		X		
Create a “Background Report” (containing no recommendations to Council) at the time of a Public Meeting.	To avoid an impression by the public that by the time the community is consulted, critical positions on the development application had already been taken by planning staff .	X			

Recommendation	Objective	2009	2010	2011	2012
Create a “pre-consultation by-law” requiring pre-consultation with the Town before applicants submit applications.	To create a formalized pre-application meeting process for development proposals.		X		
Create a “by-law” for the consideration of Council delegating to staff the authority to make decisions on whether submitted planning applications are complete under the authority of Section 23.1 of the <i>Municipal Act</i> .	Enables staff to not deal with an application further until the information requested has been received and allows members of the public the opportunity to review all information available on the planning matter prior to the information going before Council.		X		
Develop a formalized “Open House” Protocol that outlines ways of successfully obtaining public input.	Provides direction to staff, council, applicants and the public on the requirements and procedures for Open Houses.		X		
Develop a “protocol” to direct staff / Council how to record and effectively deal with complaints about the planning process.	Provides direction to staff / Council when a complaint is received.		X		
To consider “zoning with conditions” and the “development permit system” within the Official Plan Review and the Zoning By-law consolidation.	To address challenges associated with certain developments and to reducing processing times for the applicant.			X	
Develop a “Survey” to gauge customer satisfaction with the planning process.	To gain a better understanding of the customer concerns with the planning process.		X		
Develop a “Site Plan Manual” for residents and developers.	To provide guidance on the Town’s processes for site plan approval and requirements for plan submission.		X		
Develop a mission statement for Planning Services. The mission statement should be posted on the website, in the office and in the handbook.	To synthesize what the Department does for the residents of the Town and what it emphasizes in the delivery of services.		X		
Implement a set of performance measures that would serve to measure the efficiencies and effectiveness of the Department.	To demonstrate if priorities and directives have been met.			X	

Recommendation	Objective	2009	2010	2011	2012
Revise the Planning Services web page to make it more accessible and easy to use.	To promote transparency in the provision of services and to demonstrate accountability.		X		
Produce monthly tracking reports for all active applications. These reports would be discussed at TAR.	To ensure follow-up is being done on applications.		X		
Post up-to-date Planning Documents (official plan (s) & zoning by-law (s) on website.	Ensures the public has access to up-to-date Planning Documents.		X		
Develop a protocol for briefing meetings for Committee of Adjustment members.	To improve communication.		X		
Explore the possibility of providing notification of meetings to the residents of condo units, rental properties, business owners and tenants.	To improve public notice awareness of a development application.	X			

Source: City of Toronto Planning Department, Monteith Brown Planning Consultants, DMA Planning and Management Services, Meridian Planning and London Borough of Merton.

Appendix E

Survey of User Fees In Selected Municipalities

Mun.	Consent	Minor Var.	H-Rem.	ZBA	OPA	Site Plan	Site Plan Amend.	Sub.	Condo	Part-Lot Control	Temp. Use By-law
Kingsville 20,100	\$675	\$350	\$1,000	\$3,000	\$3,000	\$1,250	\$750				\$3,000
Essex 20,974	\$550	\$550	\$1,600	Major \$4,000	\$4,100 \$5,000 deposit	Agreement \$1,700 \$2,500 deposit	Major \$1,100 Minor \$650 plus actual costs, \$1,500 deposit	\$7,150 \$8000 deposit	\$7,150, \$8000 deposit	n.a.	\$1,750, plus \$2,500 deposit
Tecumseh 24,197	\$447	\$447	\$558	Major \$1,675, deposit \$500, Minor \$837, deposit \$250	\$1,675, deposit \$500	Agreement \$1,675, \$500 deposit	Major \$837, \$500 deposit, Minor \$558, \$500 deposit	\$1,675, \$500 deposit	\$1,675, \$500 deposit	\$558	\$837, deposit \$250, renewal \$558
Leamington 25,210	\$575	\$400	\$500	\$2,000	\$2,000	Agreement \$1,000	\$500	\$2,500	\$2,500	\$500	\$500
LaSalle 27,700	\$300, plus \$250 per lot (ex. 1st)	\$300	Minor \$1000, Major \$2000	Minor \$1000, Major \$2000	\$2,000	\$1,000	\$1,000	\$2,000	\$2,000	\$2,000	Minor \$1000, Major \$2000
Lakeshore 31,644	\$600, combined \$850	\$500, combined \$850	\$500	\$500, plus actual costs, \$2,000 deposit	\$500, plus actual costs, \$2,000 deposit, combined	Major: \$5000 (\$1000 non- refundable), plus actual costs, Minor: \$1,000 (\$500 non- refundable, plus actual costs	n.a.	\$5,000 (\$1,000 non- refundable), plus actual costs	\$5,000 (\$1,000 non- refundable), plus actual costs	\$500	\$500, plus actual costs, \$2,000 deposit
Orangeville 27,981	\$1,600	\$800	A \$1,1000 B \$1,600	\$6,300	\$6,500	Major \$5,800 Minor \$1,200	Major \$5,800 Minor \$1,200	\$12,800	\$2,100	\$1,700	\$6,300

Mun.	Consent	Minor Var.	H-Rem.	ZBA	OPA	Site Plan	Site Plan Amend.	Sub.	Condo	Part-Lot Control	Temp. Use By-law
Stratford 31,000	\$836	\$784	\$418	\$2,300	\$4,182	\$2,196	Major \$1,046, Minor \$784	Major \$9,408, Minor \$7,840	Major \$9,408, Minor \$7,840	\$209, plus \$105 for each addition lot created	\$2,300
Innisfil 31,175	\$750	\$1,430	\$500	\$2,000	\$2,500, plus actual costs	Res: \$650, plus \$10/ unit , Non-Res: \$650, plus, ranges from \$540 to \$2,710	\$650	\$6,000	\$760	\$1,000	\$2,000
Orillia 30,255	\$1,000	\$750	\$1,000	Major: \$2,900 Minor: \$1,500	\$4,000	Maj: \$3,500, Min:\$2,500	\$500	Ranges from \$3,500 to \$7,800	Ranges from \$3,500 to \$7,800	\$1,000	\$1,500
Tay 9,746	\$600	\$350	\$300	\$1,000	\$2,000, plus \$1,000 deposit	\$1,000, plus \$1,000 deposit	\$1,000, plus \$1,000 deposit	\$5,000, plus \$5,000 deposit, Agreements \$2,000, plus \$2,000 deposit	\$5,000, plus \$5,000 deposit, Agr. \$2,000, plus \$2,000 deposit	\$1,000	\$1,000
Belleville 42,300	\$650	\$550	\$200	Ranges from \$850 to \$1,750	Ranges from \$1,350 to \$2,250	Agreement: \$350 Res: \$200 plus \$25 per unit, max \$2,850	Major: \$350, Minor: \$175	\$1,000 plus \$85 per lot / unit	\$1,000 plus \$85 per lot / unit	\$500 plus \$100 per parcel	\$1,150
Quinte West 36,910	\$1,550	\$700	\$2,000	\$2,000	\$2,750	\$1,500	\$1,500	\$2,750	\$2,750	\$2,750	\$2,000
Haldimand 43,728	Major \$1,400, Minor \$840 Major (septic): \$1,600, Minor (septic): \$1,040	Major (with sewer): \$1,400, Minor (with sewer) \$700, Major (septic): \$1,550, Minor (septic): \$850	\$350	\$2,450, plus \$150	\$2,450, plus \$150 Major (Com): \$5,040, plus \$150	\$1,750, plus addition \$1,000	Partial: \$350, Full: \$840, plus \$1,000	\$2,450, plus \$50 per first 10 lots, then \$20 per lot, max: \$3,000	\$2,450, plus \$50 per first 10 lots, then \$20 per lot, max: \$3,000	\$2,100	\$2,450, plus \$150

Mun.	Consent	Minor Var.	H-Rem.	ZBA	OPA	Site Plan	Site Plan Amend.	Sub.	Condo	Part-Lot Control	Temp. Use By-law
New Tecumseth 24,371	\$1,500	\$700	\$500	\$7,000	\$7,000	Base Fee: \$2,500, Plus Com/Office \$.80/m2 gfa, Ind/off/inst: \$.50/m2 gfa, Res: \$100/unit	n.a.	Base Fee: \$6,900, plus \$50/unit upon App and \$50/unit upon Approval, Com: \$500/ha, Ind: \$125/ha, Inst: \$125/ha	Base: \$6,900, plus \$20/unit, Ind/Com: \$50/ha	\$1,500	\$1,500
Welland 47,236	\$1,000.00	\$700	\$400	\$2,200	\$2,200	\$1,800	\$800	\$5,000, plus \$900 for each Phase over one, \$10/Lot or Block excluding .3 m reserves	\$5,000	\$510	\$2,200
Halton Hills 51,300	\$3,862	\$1,545	\$2,060	\$10,300	\$10,300	Major: \$12,360 Base: \$7,210 Minor: \$2,575	Major: \$2,575 Minor: \$772	Sub -Major: \$20,600 Minor:\$10,300	Condo: Major: \$15,913 Minor:\$11,845	Major:\$7,725 Base: \$5,150 Minor: \$2,575	\$6,180
Milton 65,800	Major: \$6,540 Minor: \$4,741	Major: \$4,333 Minor:\$800	\$4,097	Major: \$18,943 Base: \$8,312 Minor: \$7,511	\$14,852	Agreement Fee: \$477 Non Res (Base): \$1,464 Non-Res fee per hectare: \$3,034 Res (Base): \$836 Res per unit: \$458	Major revision: 50% of fee Minor: 15% of fee	\$35,534	\$35,534	\$4,988	Type 1: \$11,054 Type 2: \$6,134
Clarington 65,902	\$300) plus \$367.50	\$446.25	\$2,100	Major: \$5,250 Minor: \$2,100	Minor \$3,675, Major \$6,300	Res: \$2,500 plus \$175 per unit, Com: \$3,000 plus \$25 per 100 sq.m. gfa	Res: \$600 plus \$25 per 100 sq.m gfa - Max. \$5,000 Com: \$1,500 plus \$25 per 100 sq.m. Ind/other: \$600 plus \$10 per 100 sq.m. gfa Max: \$6,000	Res: \$10,000, plus \$250 per unit (\$50 for apt unit) Non-Res: \$5,250	\$2,500, plus \$25 per unit Conversion: \$1,575	\$500, plus \$25 per unit Max: \$5,000	Major: \$5,250 Minor: \$2,100

	Consent	Minor Var.	H-Rem.	ZBA	OPA	Site Plan	Site Plan Amend.	Sub.	Condo	Part-Lot Control	Temp. Use By-law
Mun.											
Kawatha Lakes 66,268	\$858 plus ad fee \$115	652 plus ad fee \$115	\$878 plus \$115 plus \$288 (newspaper)	\$1,790 base \$90 per unit max 20 units, \$59 per 100 sq.m. com gfa, \$30 per 100 sq.m. Ind. gfa	\$2,604 plus \$288 ad fee	\$1,698 plus \$358 (legal review and reg. of agreement)	\$256 plus \$358 for legal review and reg. of agreement	\$5,068 plus \$127 per lot per unit up to max. 20 lots / units plus \$288 ad fee	\$5,068 plus \$127 per lot per unit up to max. 20 lots / units plus \$288 ad fee	\$547 plus \$35 for each additional division	\$1,790 base \$90 per unit max 20 units, \$59 per 100 sq.m. com gfa, \$30 per 100 sq.m. Ind. Gfa
Sarnia 71,419	\$900	\$469	\$1,500	Regular: \$3,800 Tech: \$1,500	\$4,200	Ranges from \$1,000 to \$3,000	Ranges from \$1,000 to \$3,000	\$3,635	\$1,816	\$115	Regular: \$3,800 Tech: \$1,500
Bradford West Gwillimbury 24,000	\$2,000	\$800	\$3,500	\$5,000 (<= .2 Ha) or \$9,000 (all others)	\$15,000 (<.8 Ha) or \$24,000 (all others)	\$4,000 plus \$1,200 per hectare additions: 65% of the new dev. fee	\$4,000 plus \$1,200 per hectare Additions: 65% of the new dev. Fee	\$10,000 plus \$50 per lot/unit max: \$19,500	\$10,000 plus \$50 per lot/unit max: \$19,500	\$1,000	\$5,500
Kingston 104,851	\$1,250 plus \$77.75	\$1,271.75 plus \$77.75	\$1,310	Major: 6,640, Basic: \$4,315, Minor: \$2,125 * plus \$77.75	Major: \$7,455 Basic: \$4,315 plus \$77.75	Minor:\$525 plus \$77.75 Res: ranges from \$1,650 to \$2,315 , plus per unit and gfa fees, Other: >3000 sq,m gfa \$2,625 plus gfa fees	Major:\$995 plus \$77.75 (Eng. Fees) plus \$440 (legal) Minor: \$245	Major: \$5,800 plus \$80 per lot or unit Minor: \$3,320 plus \$71 per lot or unit	Major: \$3,320 plus \$63 per unit Minor: \$2,475 plus \$49 per unit	\$1,940 plus \$651.53 (Eng. Fee)	Major: \$6,640 plus \$77.75 (Eng. Fee) Minor: \$4,315 plus \$77.75
Chatham - Kent 108,177	\$1,515 (fee) deposit - full cost recovery of external costs plus \$190 per each additional lot	\$1,195 (fee) deposit - full cost recovery of external costs	\$1,065 (fee) deposit - full cost recovery of external costs	\$1,970 deposit full cost recovery of external costs	\$4,870 deposit full cost recovery of external costs	\$1,315 plus \$345 (legal fee) deposit full cost recovery of external fees	\$255 (fee)	\$10,895 Plus \$645 (legal) deposit - full cost recovery of external costs	Conversion: \$3,280 deposit full cost recovery of external costs	\$1,515 (fee) deposit full cost recovery of external costs	\$1,970 deposit full cost recovery of external costs

Mun.	Consent	Minor Var.	H-Rem.	ZBA	OPA	Site Plan	Site Plan Amend.	Sub.	Condo	Part-Lot Control	Temp. Use By-law
Windsor 216,473	\$1,066 lot, \$608 lot addition	Res:\$451 Com, inst, ind, multi-res: \$1,293 vacant land: \$1,066	\$264	Major: \$525 plus \$50 unit plus \$1,201 Minor: \$525 plus \$50 unit plus \$2,253	Major: \$3,520 Minor:\$1,430	\$2,326	\$1,703	Base Fee: \$2,717 \$1000 legal \$96 per unit / lot	Conversion: \$5,434 (1000 legal) \$60 per unit / lot	\$286 plus \$96 (additional lot / block) Max: \$8,800 legal: \$525 plus \$50 per lot	Major: \$525 plus \$50 unit plus \$1,201 Minor: \$525 plus \$50 unit plus \$2,253
Collingwood 15,503	\$2,355 plus Cer. Fee \$1,445	\$2,120	\$1,565	Major: \$5,360 Minor:\$3,200	\$12,540	\$11,455 (Major), \$5,900 (Minor)	\$5,900 (Major Amendment), \$4,900 (Minor Amendment), Minor adjustment \$2,500	Res: \$17,495, extension of draft approval \$2,410 Revision of draft approved \$3,785	\$6,075	n.a.	\$5,420
Springwater 18,679	\$1,100	\$1,300	n.a	\$5,300 (Major) \$2,700 (Minor)	\$12,100 (Major) \$5,300 (Minor)	\$14,500 (Major) \$7,400 (Minor)	n.a.	\$15,500	\$15,500	n.a.	n.a
Ajax 74,907	\$1,964	Res: \$750 Non-Res: \$2,141	\$2,500	\$19,104 Major \$9,000 Minor	\$34,809 Major \$15,000 Minor	Res: \$6,735 plus unit fee Non-res: \$6,735 plus fee per gfa	Major: \$15,127 Minor: \$6,528	Res: \$13,438 plus per unit fee Non-res: \$13,489	\$8,925	\$1,779 plus per unit fee to a max	\$9,000.

Appendix F

Proposed Fee Structure For Planning Services

Application Type or Planning Service	Existing Fee	Cost Recovery Fee *Total internal costs	Proposed New Fee (non-refundable – administration fee) (deposit / actual costs: full cost recovery of services rendered e.g. consultant / planner costs)
OPA	Deposit \$2000, \$500 non-refundable + actual costs		
Major	Existing fee	\$16,498.68	Deposit \$5000, \$2,000 non-refundable + actual costs
Minor	Existing fee	\$6,695.49	Deposit \$3500, \$1,500 non-refundable + actual costs
ZBA	Deposit \$2,000 \$500 non-refundable + costs		
Major	Existing fee	\$9,238.74	Deposit \$4,500, \$2,000 non-refundable + actual costs
Minor	Existing fee	\$4,015.06	Deposit \$3,500, \$1,500 non-refundable + actual costs
Temporary Use By-law	ZBA existing fee	\$4,015.06	Deposit \$3,500, \$1,500 non-refundable + actual costs
By-law to extend the time limit for a Temporary Use	No fee		\$500 (Fee)
Combined OPA & ZBA	Deposit \$3000, \$1000 non-refundable + costs	Between \$9,238.74 \$4,015.06	Deposit \$6,000, \$2,700 non-refundable + actual costs
H- Removal	\$500	\$1,997.35	\$1,200 (Fee)
Deeming By-law	No fee	Municipality has not processed a deeming by-law to date.	\$1,000 (Fee)

Application or Planning Service	Existing Fee	Cost Recovery Fee *Total internal costs	Proposed New Fee (non-refundable – administration fee) (deposit / actual costs: full cost recovery of services rendered e.g. consultant / planner costs)
Site Plan – Minor	Deposit \$1000, \$500 non-refundable + costs	\$ 3,513.61	Deposit \$3,000, \$1,500 non-refundable + actual costs
Amendment	Existing Site Plan Fee	\$1,955.50	Deposit \$2,500, \$1,000 non-refundable + actual costs
Amendment (no council)	Existing Site Plan Fee	\$1,254.78	\$500 (Fee)
Request for Security Release	No fee		\$150 (Fee)
Release of Agreement	No fee		\$150 (Fee)
Site Plan – Major	Deposit \$5000, \$1000 non-refundable + costs	\$ 9,211.73	Deposit \$5,500, \$2,500 non-refundable + costs
Amendment	Existing Site Plan Fee	\$ 8,537.27	Deposit \$4,000, \$2,000 non-refundable + actual costs
Request For Security Release	No fee		\$200 (Fee)
Release of agreement	No fee		\$150.00
Telecommunication Facilities		Municipality has not processed an application to date.	
Exempt From Public Consultation	\$360		\$500 (Fee) plus actual costs
Not Exempt	\$710		\$800 (Fee) plus actual costs

Application or Planning Service	Existing Fee	Cost Recovery Fee *Total internal costs	Proposed New Fee (non-refundable – administration fee) (deposit / actual costs: full cost recovery of services rendered e.g. consultant / planner costs)
Subdivision Application	Deposit \$5000, \$1000 non-refundable + costs	\$ 41,182.40	Deposit \$10,000, \$4,500 non-refundable + actual costs
Revisions to a Draft Approved Plan of Subdivisions (i.e. red-line revision)			
Minor Revision	Subdivision Application fee currently charged	\$ 12,306.32	Deposit \$6,000, \$2,500 non-refundable + actual costs
Major Revision	Subdivision Application fee currently charged	\$ 28,641.38	Deposit \$8,000, \$4,000 non-refundable + actual costs
Request to amend conditions of Draft Approval	No fee		Deposit \$3,000, \$1,000 non-refundable + actual costs
Request to extend Draft Approval	No fee		\$200(Fee)
Condominium Application	Subdivision Application fee charged	\$ 41,182.40	Deposit \$10,000, \$4,500 non-refundable + actual costs
Revisions to a Draft Approved Plan of Condominium (i.e. red-line revision)			
Minor Revision	Subdivision Application fee charged	\$ 12,306.32	Deposit \$6,000, \$2,500 non-refundable + actual costs
Major Revision	Subdivision Application fee charged	\$ 28,641.38	Deposit \$8,000, \$4,000 non-refundable + actual costs
Request to amend conditions of Draft Approval	Currently no fee charged		Deposit \$3,000, \$1,000 non-refundable + actual costs

Application or Planning Service	Existing Fee	Cost Recovery Fee *Total internal costs	Proposed New Fee (non-refundable – administration fee) (deposit / actual costs: full cost recovery of services rendered e.g. consultant / planner costs)
Request to extend Draft Approval	No fee		\$200(Fee)
Condominium Conversion	Subdivision Application fee charged		Deposit \$3,000, \$1,000 non-refundable + actual costs
Preparation of a subdivision, condominium, site plan or development agreement	Currently part of Application(s) fee		The Applicant is required to reimburse the Town for its legal costs associated with preparing the agreement.
Lift Part Lot Control	\$500	\$ 1,254.78	\$1,000 (Fee)
Extend Part Lot Control	Currently no fee charged		\$500 (Fee)
Minor Variance	\$500	\$ 2,505.49	Deposit \$1,200, \$750 non-refundable + actual costs
Amendment to Minor Variance when re-circulation is required	No fee		\$200
Tabling Fee	No fee		\$100
Special Hearing	\$500		\$500
Consent	\$600	\$ 3,067.97	Deposit \$1,500, \$1,000 non-refundable + actual costs
Tabling Fee	No fee		\$100
Special Hearing	\$500		\$500
Amendment to Consent (re-circulation)	No fee		\$200

Application or Planning Service	Existing Fee	Cost Recovery Fee *Total internal costs	Proposed New Fee (non-refundable – administration fee) (deposit / actual costs: full cost recovery of services rendered e.g. consultant / planner costs)
Stamping Fee (certificate) for consent, new lot & lot additions	No fee		\$100
Stamping Fee (certificate) for lease, easement	No fee		\$65.00
Combined Minor Variance & Consent	\$850		Deposit \$1,700, \$1,200 non-refundable + actual costs
Ally/Road Closing	Deposit \$1000, \$400 non-refundable + costs		Deposit \$5,000, \$1,500 non-refundable + actual costs
Compliance Letters	\$50		\$100 (Fee)
Peer Review of all specialized reports/studies	Applicant responsible for all costs		\$3,000 deposit (Applicant responsible for all actual costs)
OMB costs	No deposit		\$2,500 deposit (Applicant responsible for all actual costs) where the Town becomes involved in an appeal to the OMB, and where the Town is in support of the application, the applicant shall pay Town staff costs in terms of time and expenses and attendance at hearings, mediations or arbitration.
Refund Policy	No refund policy		Where an application is withdrawn after a file has been open, but before it has been circulated: 90%

Application or Planning Service	Existing Fee	Cost Recovery Fee *Total internal costs	Proposed New Fee (non-refundable – administration fee) (deposit / actual costs: full cost recovery of services rendered e.g. consultant / planner costs)
			Where an application is withdrawn after a file has been circulated, but before it has been considered at a public meeting: 50% Where an application is withdrawn after the file has been considered at a public meeting: 0%
Photocopies (per page)	No fee		25 cents
Information search (per hour, first hour free)	No fee		\$20.00 per hour, first hour free.
Advertising fee	Currently part of application costs.		Applicant will be responsible for any required advertising costs.
More than one Open house or Public Meeting required	No fee		\$300
Notice to cancel Public Meeting or Open House	No fee		\$200
Re-circulation of Public Notices	No fee		\$200
Engineering review fee	No fee		\$150
Legal Review fee	No fee		Applicant will be responsible for all costs incurred.
Septic fee Review	No fee		\$150
Pre-consultation (more than three meetings)	No fee		\$75(Fee)